

BRAZIL
**BETWEEN
TWO WESTS**

From the Editors

FELICIANO DE SÁ GUIMARÃES & HUSSEIN KALOUT

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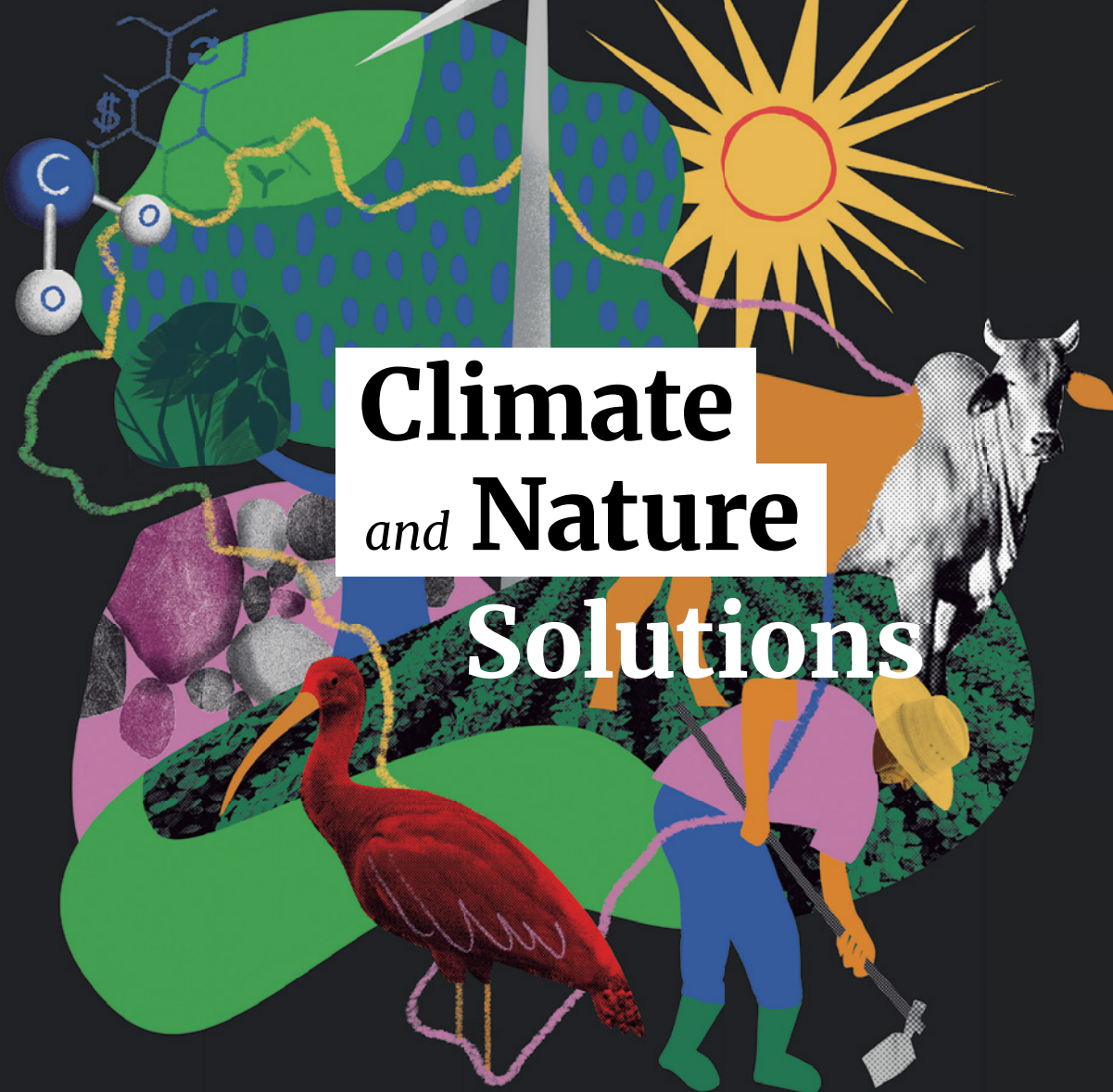
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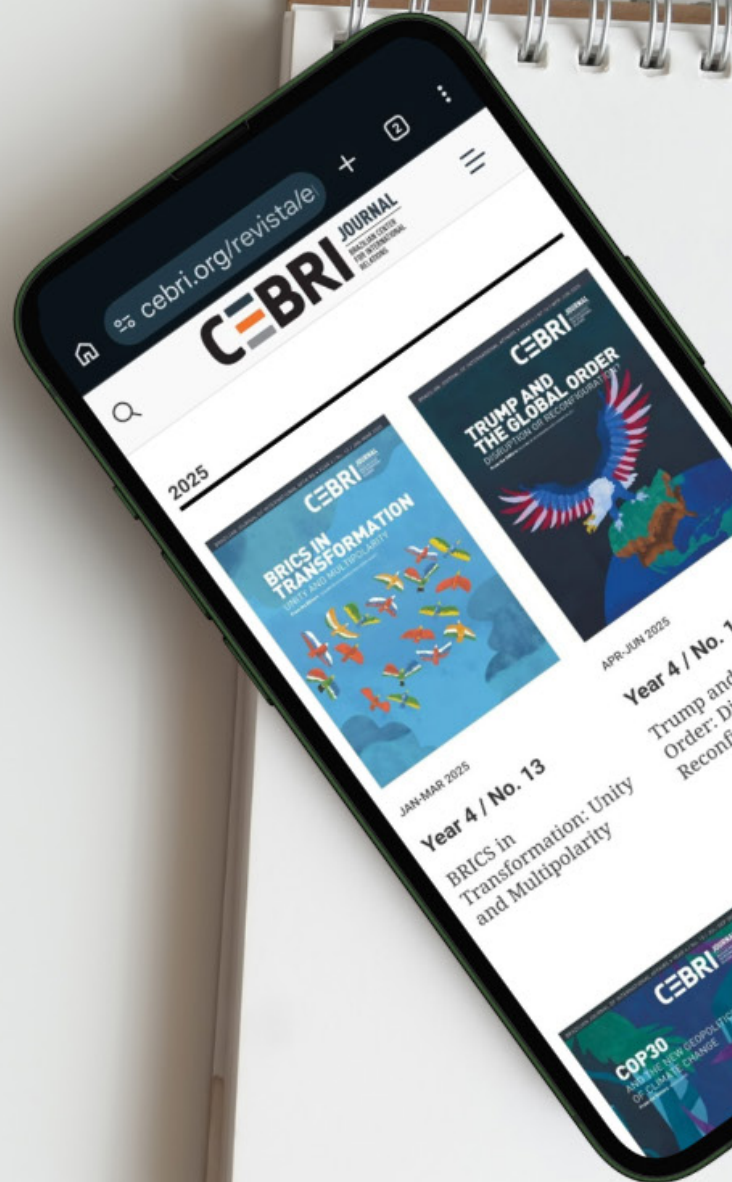
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FROM THE EDITORS

Brazil Between Two Wests 11

Feliciano de Sá Guimarães & Hussein Kalout



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.

Brazil and the United States: On a Collision Course?

Rubens Ricupero

Brazil and the United States: On a Collision Course?

Rubens Ricupero

Abstract: The text traces Brazil-US 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.

Brasil e Estados Unidos em rumo de colisão?

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.

I don't remember exactly, but I believe it was in the first half of 1993, a few months after Bill Clinton's inauguration. I had been Brazil's ambassador to the United States since August 1991, during George H. W. Bush's single term (George Bush Sr.). Invited to speak at the Foreign Service Institute in Arlington, something like Brazil's Rio Branco Institute for diplomatic training, I was taken aback by the first question, asked as soon as I finished my opening remarks: "Are the United States and Brazil destined to clash in the future?"

I replied that I saw no rational basis for an irreconcilable clash of interests, which is not the same thing as ordinary divergences of interest, or differences in how situations are assessed. Brazil's central objective has been, and remains, development that enables the country to realize its potential: not to amass international power, but to eradicate absolute misery and hunger, a scourge that still afflicts millions, reduce inequality, and give each person what the U.S. Declaration of Independence called the "pursuit of happiness": the possibility, not the guarantee, of well-being and prosperity.

Today, after the profound shock produced by the second Trump administration in international and bilateral relations, I probably would not answer with the same confidence about the future.

Until the proclamation of the republican system of government in Brazil, the two countries largely regarded one another as peripheral; the relationship, marked more by indifference, was not without friction. The Brazilian Imperial Court, which decreed official mourning upon the death of the heir to the Russian Empire and the Queen Mother of the Netherlands, did not do the same when President Lincoln was assassinated. After the Regency shook off Pedro I's baleful legacy, which had left Brazil almost a semi-protectorate under Great Britain, the Imperial government kept its distance from the British and Europeans, declining to sign trade agreements with more powerful nations. It began to move away from that line only after the Republic was proclaimed, inaugurating a rapprochement with the United States and Latin American countries. One of the first visible results was the decision to sign the 1891 trade agreement with Washington (January 31, 1891).

During the Armada Revolt (1893–1894), the U.S. Navy intervened on two occasions in support of the Republican government, which was threatened by the

Rubens Ricupero is a retired diplomat and historian. He served as Brazil's Ambassador to the United Nations in Geneva, and as Ambassador to Washington and Rome. He was an adviser to Tancredo Neves and José Sarney; served as Minister of the Environment and the Amazon; Minister of Finance; and Secretary-General of UNCTAD. He is an Emeritus Advisor to CEBRI.

rebels' naval blockade and bombardment. A few years later, Baron Rio Branco forged a close, if asymmetrical, partnership with the rising great power, the United States, especially after 1905, when both countries agreed to upgrade their diplomatic missions in Washington and Rio de Janeiro to embassies.

As the only Latin American country bordering three European countries in the age of imperialism, Brazil expected the United States—through the Monroe Doctrine—to provide protection against the era's hegemonic imperial powers, especially Britain and France. In return, Brazil offered support for U.S. policy in the Caribbean, Central America, and Latin America more broadly—regions where many countries had border disputes with Brazil, in which we sought U.S. support or, at minimum, neutrality.

It was a realistic bargain: both sides had something to offer, and it matched trade realities. From roughly 1870 onward, the United States became the principal market for Brazilian exports of coffee, rubber, and cocoa—accounting for 36% of the total by 1912. Later, U.S. investors would overtake the British to become the largest foreign investors in our economy, a position they hold to this day.

Rio Branco was less realistic when he counted on the Americans to elevate Brazil's status among the European powers beyond what the era's hierarchies warranted. He was soon disillusioned at the Second Hague Peace Conference. Even so, Rio Branco built an "Unwritten Alliance" with Washington which, according to Secretary of State Elihu

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Root in a speech in Rio de Janeiro, rested on an explicit understanding: “not in formal written treaties of alliance, but in the universal sympathy and confidence and esteem of their peoples.” In other words, what mattered was the perception that Brazil, more than any other Latin American country, had forged close, special ties with the United States.

On the strength of that success, the diplomatic paradigm created by Rio Branco shifted from novelty to dogma—so much so that decades later Oswaldo Aranha stated, in 1950 at the Superior War College, that “no other policy is suitable for us than to support the United States in the world in exchange for its support for our political, economic, and military preeminence in South America” (Hilton 1994, 463).

In those stark terms, the former foreign minister underscored a reality that, more than anyone, he had helped to create; first at the continental level, by leading the Third Inter-American Consultation Meeting (January 1942) in Rio de Janeiro to pledge hemispheric solidarity (with the exception of Chile and Argentina) to the United States after Pearl Harbor; and soon after, by promoting the military alliance that would make Brazil the only Latin American country to participate effectively alongside the U.S. in World War II.

In contrast to Argentina’s ambiguity, Brazil emerged from the conflict militarily strengthened and politically prestigious, with the beginnings of heavy industry in Volta Redonda. It also nurtured the illusion that it had earned a significant role in reconstructing the postwar world, hoping to become the “sixth permanent member of the Security Council,” as it was then called. This repeated the earlier mistake of inflated expectations: 25 years before, favored by U.S. backing at the Paris Peace Conference at the end of World War I, Brazil came to believe it would become a permanent member of the Council of the League of Nations.

At the same time, in 1946, Brazilian leaders were setting themselves up for another disappointment by believing they deserved a Marshall Plan like Europe’s, without grasping the shift in strategic priorities. That fantasy took a long time to fade, resurfacing under JK as Pan-American Operation (1958): an implausible scheme to persuade Eisenhower-era Republican conservatives to allocate public resources to Latin American governments for industrialization and infrastructure.

Repeated disappointments were not enough to push Brazilian leaders toward neutrality or opposition to Washington. In the Cold War climate, the ruling class’s solidarity with the Western Cause—written, as it were, in all caps—spoke louder. Far

from being seen as a disgrace, “automatic alignment” was framed as self-interest. After all, in confronting the Soviet Union abroad, the Americans were doing nothing different from what Brazilian conservatives under the Dutra government were doing at home in combating communist subversion as an existential threat. Hence Brazil’s role—once again—as promoter, at the Quitandinha conference (1947), of the Inter-American Treaty of Reciprocal Assistance (TIAR), the first in a network of alliances that would culminate in the main one, NATO, in the Washington Treaty (1949).

Something, however, had broken down, and Brazil would not take part in the Korean War, which began in 1950. As expectations eroded, fertile ground also emerged for a view of the United States as the personification of imperialism—and a threat to world peace—to take hold, under the influence of rising nationalism (the creation of Petrobras, for example) and Marxism. In Getúlio Vargas’s 1954 suicide note, a new mythology was born: attributing the Brazilian people’s ills to “decades of domination and exploitation by international economic and financial groups,” and to an “underground campaign of international groups” allied with domestic groups—a code that at the time pointed to the powerful Yankees, since the exhausted Europeans or Japanese were still recovering from the ravages of World War II.

From that conjunction of factors, or, in reaction to them, emerged the first serious schism within the circles that had always set foreign policy. Abandoning the tacit presumption that Brazilian strategic interests essentially coincided with American and Western ones, an influential faction found in Jânio Quadros the politician whose electoral success made room for the Independent Foreign Policy (PEI). Its guarantor and first architect was Jânio’s foreign minister, Afonso Arinos de Melo Franco. Always relative to someone or something, “independence” in 1961 meant diverging from the United States on Cuba under Fidel Castro, arguing that Brazil’s strategic interests did not necessarily coincide with the American position on this crucial issue for hemispheric security.

From there, the divergence expanded to issues such as national liberation movements in Africa’s colonies, trade and economic ties with the USSR and the communist bloc, recognition of the People’s Republic of China, and Brazil’s ambivalence during the Cuban Missile Crisis in 1962. Developed by San Tiago Dantas and Araújo Castro, the PEI essentially consisted of refusing to view the world solely through the Cold War prism. Never accepted—or even tolerated—by Washington, this orientation would be one factor leading the United States to actively encourage and support the conspiracy to overthrow João Goulart and, subsequently, to assist the military regime’s first steps from 1964 to 1967.

This capacity to influence—and to subvert—the course of Brazilian history, already tested on a smaller scale during the Armada Revolt at the end of the nineteenth century, underscores the fundamental power gap that made the Brazil-United States relationship the most asymmetrical and consequential of all our diplomatic relationships.

The military regime's first three years, under Castello Branco, marked the peak of U.S. economic assistance and a return to diplomatic alignment under the doctrine of "ideological borders": the break with Havana; intervention in the Dominican Republic; and foreign minister Juracy Magalhães's line that "what is good for the United States is good for Brazil," a popular rendering of the idea of coinciding strategic interests. That this was not quite true became clear in Washington's growing disapproval of the regime's dictatorial turn; the termination of economic aid in 1967; Brazil's refusal to send troops to Vietnam; disagreement over Brazil's decision not to adhere to the Nuclear Non-Proliferation Treaty (1968); and U.S. condemnation of AI-5.

Despite these signs of growing estrangement, cooperation against Allende in Chile and other leftist challenges resumed in the first half of the 1970s, between the repressive Médici government of the "economic miracle" and the Nixon-Kissinger duo in Washington. Nixon's unfortunate ad-lib—"as Brazil goes, so will go the rest of the Latin American continent" (December 1971)—was matched by an intense correspondence of consultation between Kissinger and his interlocutor "dear Antonio," the foreign minister Antonio Francisco Azeredo da Silveira. That illusion of renewed closeness did not last: it was shattered by Jimmy Carter's arrival in the White House and his post-1977 campaign for human rights and against the Brazil-Germany Nuclear Cooperation Agreement (1975).

In response, Geisel denounced the military agreement with the United States. Since 1974, Brazil had already adopted the diplomacy of "responsible pragmatism" championed by Minister Silveira, which in some respects reconnected with the spirit of the Independent Foreign Policy by asserting autonomy on issues such as recognizing the independence of Angola and Mozambique, establishing relations with Beijing, distancing Brazil from Israel, and supporting the UN resolution that treated Zionism as racism. With one or two later adjustments, such as on that anti-Zionist resolution, this increasingly autonomous line would be pursued for the remainder of the military regime.

After redemocratization in 1985, this approach consolidated, in broad outline, into a "consensus diplomacy" under Tancredo, Sarney, Collor de Mello, and Itamar.

It arguably reached its high point during the two terms of Fernando Henrique Cardoso (1995–2002) and Luiz Inácio Lula da Silva (2003–2010), gaining prestige and global influence.

It came to an end with the USSR’s disintegration into fifteen new countries (1991), the geopolitical cataclysm that began in October 1989 with the fall of the Berlin Wall, and the disappearance of communist regimes in Eastern and Central Europe. The end of the Cold War removed the argument that had most supported the thesis of coinciding interests. Even shortly before that, Brazilian foreign policy was already diverging from that of the United States on important issues. When Saddam Hussein invaded Kuwait, Brazil declined to join the U.S.-led “coalition of the willing,” because our national interest prioritized rescuing the hundreds of Brazilian construction company Mendes Júnior workers held hostage by the Iraqi tyrant. We did not resent the fact that Argentina sent two warships and was designated one of the United States’ principal allies outside NATO.

More than thirty years have passed since the episode I recounted at the Foreign Service Institute. The era of U.S. unipolar power came and went. Starting in the mid-2000s—and clearly by around 2015, perhaps earlier—Obama began to signal a strategic shift toward China and East Asia, the so-called “pivot to Asia.” Around the same time, in 2014, the strategic challenge posed by Russia became increasingly evident following the annexation of Crimea and support for Donbass separatism. This ushered in a period of conflict and alarming erosion of norms and standards in the international system which, in some respects, evokes the Cold War—at least in the division of the world into hostile alliances and the growing militarization of conflicts.

More than thirty years have passed since the episode I recounted at the Foreign Service Institute. The era of U.S. unipolar power came and went. [...] This ushered in a period of conflict and alarming erosion of norms and standards in the international system which, in some respects, evokes the Cold War—at least in the division of the world into hostile alliances and the growing militarization of conflicts.

Over the same three decades, Brazil evolved economically, regained a minimum degree of monetary stability, and overcame the chronic threat of external strangulation by accumulating reserves—made possible by pre-salt oil and by diversifying exports of mineral and agricultural commodities. The reduction in external vulnerability was driven mainly by China’s demand for commodities and, increasingly, by Asia as a whole. This new reality—more diversified foreign trade focused on Asian markets (about 50% of export destinations), and demand centered on primary products—inevitably shaped Brazil’s diplomatic choices.

While Brazil was undergoing this evolution, U.S. strategic interests drove sharp changes in economic and security priorities. Having moved beyond Cold War-era fears, Washington turned its attention to other troubled regions. In Latin America, it focused on issues such as migration and drug trafficking and, for several years, on promoting free trade agreements, symbolized by the proposed FTAA. That proposal never became attractive or convincing for Brazil and other Southern Cone countries, which lacked Mexico’s geographic proximity and the maquiladora model (or anything comparable). Moreover, they competed with the United States in agricultural exports, and U.S. offers of meaningful market access in that area were nonexistent or minimal.

Even that phase of promoting free trade agreements, strong in the Clinton years, gradually faded, giving way to an unprecedented reality: successive Trump and Biden administrations distanced themselves from the principles of the multilateral trading system they had created and upheld in the postwar period. For someone like me—who, through most of the Uruguay Round at the GATT (I was head of Brazil’s mission in Geneva and the country’s chief GATT negotiator from 1987 to 1991), had to endure pressure and scolding on everything from industrial policy and domestic job protection to the desire to preserve an industrial base—it has been astonishing, almost hard to believe, to see the United States now champion many of the very tools it once abhorred.

Having moved beyond Cold War-era fears, Washington turned its attention to other troubled regions. In Latin America, it focused on issues such as migration and drug trafficking and, for several years, on promoting free trade agreements [...].

I do not regret this shift, because in many respects it amounts to adopting what developing countries have always sought: greater “policy space,” more flexibility to pursue gradual liberalization, and room to promote sectors where competitiveness can be built with the right incentives.

It is unfortunate that Donald Trump’s return to power—in a second term both revised and worse—triggered a regrettable rollback in values and aspirations and worsened the response to major global problems, beginning with what I would call the “mother of all threats” to the survival of human societies: global warming. The United States’ second withdrawal from the Paris Agreement on climate change greatly complicates the already difficult fight against global warming, on the eve of COP 30 in Belém. Unable to count on U.S. cooperation, Brazil, as host of the event, and other committed countries, such as those of the European Union, will have to redouble their efforts to keep the process of building climate consensus alive.

The fight against another major global threat, pandemics, has also suffered a severe blow as a result of Trump’s decision to withdraw the United States from the World Health Organization (WHO). The same posture of questioning and undermining multilateral institutions and processes puts at risk an international system based on norms and on decisions reached democratically through dialogue and negotiation. As with climate change, the pernicious actions of the current U.S. government will have to be offset by others’ intensified efforts in the opposite direction. This is one of the most serious challenges the international community has faced in the eighty years since the end of the war.

In the search for practical solutions to the major real issues—world hunger; the eradication of absolute poverty; the reduction of inequalities; and the urgent need to update multilateral institutions, beginning with the UN and its Security Council, for a changing and demanding reality—Brazil’s worldview, priorities, and sensibilities collide with the vision and interests of Trump’s United States.

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It is clear that our reading of what China's rise represents, for example, or our assessment of conflicts in the Middle East, will bear the imprint of Brazilian national interests and of our aspiration to a role commensurate with Brazil's specific weight—its population—and its diplomatic tradition of peaceful, original action.

More than ever, Brazil will have to concentrate its diplomatic capacity, both analytical and operational, on working with like-minded countries to defend an international system grounded in the norms and standards of the UN Charter and the major conventions on human rights, the environment, gender equality, anti-racism, and non-discrimination. In other words, the solid foundation of our international action lies in our commitment to values and aspirations aimed at the steady advancement of humanity's moral and ethical consciousness.

In bilateral terms, we are living through one of the most delicate moments in two centuries. During the first six months of Trump's second term, there was no direct presidential-level dialogue with Lula¹. No attempt was made to arrange such a meeting, given the considerable risks; above all the evident incompatibility between the two leaders and Trump's unpredictability². Until June 2025, Brazil seemed to be off Washington's radar. The low priority assigned to the relationship was also reflected institutionally in the absence of a formal appointment of a new ambassador to

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1. The contrast is striking with other major and middle powers in the international system—such as China, Russia, the European Union, Japan, India, Canada, Mexico, and Argentina—which have already established direct high-level contacts—generally at the presidential level—through in-person meetings, phone calls, or diplomatic exchanges.

2. In light of the embarrassing episodes faced by the leaders of Ukraine and South Africa during official visits to the White House in the first half of 2025, the Brazilian government was slow to consider a bilateral presidential meeting.

Brazil³. Maintaining that diplomatic vacuum signaled a disconnect between the two countries and narrowed the space for structured cooperation.

On July 9, 2025, the situation deteriorated unexpectedly after a Trump message, sent through unofficial channels, that amounted to gratuitous meddling in Brazil's domestic political affairs. In it, the U.S. president accused Brazil's judiciary of politically persecuting former president Jair Bolsonaro and of imposing judicial "censorship" on U.S. social-media platforms. Under the misguided pretext of correcting a nonexistent trade deficit, he also announced a punitive 50% tariff on Brazilian exports, effective August 1.

On July 15, the Washington government decided to examine alleged Brazilian "unfair trade practices" by launching an investigation under Section 301 of the Trade Act. A unilateral mechanism without the neutral oversight provided by WTO proceedings, a Section 301 investigation allows the United States to act as both accuser and judge in its own case. One possible explanation for choosing this legal tool in Brazil's case is that it served as an indirect response to Paul Krugman's writings, which questioned the U.S. president's legal authority to impose tariffs for political reasons. Those criticisms may have alerted White House advisers to the initial measure's legal fragility, prompting them to seek a more formal justification under Section 301.

The reality is that, contrary to what has been alleged, the United States has accumulated a US\$410 billion trade surplus with Brazil over the past 15 years (Brazil 2025). If implemented, the tariff measure will make most Brazilian exports to the U.S. market uneconomic. At the same time, it will have negative effects on the American private sector, as noted by AmCham and the U.S. Chamber⁴. Given the bilateral imbalance in the United States' favor, a sharp contraction triggered by the tariff hike is likely to affect U.S. exporters more directly than Brazilian ones. Brazil is currently the United States' 15th-largest trading partner, while the United States ranks second among Brazil's main partners (U.S. Department of Commerce 2025)—a clear sign of asymmetrical dependence.

The measures against Brazil are a singular case in which the tariff threat is directly tied to political and sovereignty issues, such as the alleged "persecution" of Bolsonaro and Supreme Federal Court decisions related to social-media content. Possibly encouraged by figures linked to the former president—such as his son,

3. Since January 21, the U.S. diplomatic mission in Brasília has been led by Gabriel Escobar, serving as chargé d'affaires following the departure of Ambassador Elizabeth Bagley.

4. In a statement released on July 15, 2025, Amcham Brasil and the U.S. Chamber of Commerce warned of the negative impacts of the measures on supply chains and U.S. consumers, noting that more than 6,500 companies would be directly affected.

Congressman Eduardo Bolsonaro—the episode signaled the potential for political contamination of bilateral relations, increasing diplomatic risk and generating direct repercussions in Brazil’s domestic politics, with effects that could extend through the 2026 general elections.

By imposing tariffs under the pretext of defending the political rival of Brazil’s current president, and by criticizing the judiciary of a sovereign country, Trump crossed a serious line in international relations. This is not the first time the U.S. president has politicized tariffs: measures have been applied against Mexico, linked to migration control; against Canada, under a national-security rationale; and even against Colombia, in retaliation for refusing to receive deportees from the United States (Council on Foreign Relations 2025).

Since the announcement of the measures against Brazil, the issue has proceeded in fits and starts—sometimes raising hopes that rationality will prevail, sometimes reinforcing the impression that the outlook remains uncertain and unpredictable. The negotiations and arrangements reached with other partners—Mexico, South Korea, the European Union, and the one-year truce with China—may justify a cautious, fragile optimism that there is at least some room to reverse or reduce the measures’ impact.

Returning, then, to the initial question, the best possible answer, perhaps the only one, is that a collision between Brazil and the United States has ceased to be a hypothesis and has become a painful reality. Whether we are “condemned” to remain in this state will depend on how negotiations unfold by the time I conclude this article (November 1, 2025). Any prediction is risky with an interlocutor like Donald Trump, prone to caprice and volatility. It therefore seems unlikely that a definitive agreement will be reached that resolves every outstanding issue and eliminates uncertainty by the end of his term. Perhaps the most that can be expected is a scenario of “permanent negotiation.”


November 1, 2025

Postscript (January 12, 2026):

Finished on November 1, 2025, this article remains valid in its analyses and conclusions. In a sense, the two and a half months since then have confirmed and reinforced the trends identified earlier. For example, the new U.S. National Security Strategy, dated November 2025, established the so-called “Trump Corollary to the Monroe Doctrine,” defined as a reaffirmation and enforcement of that doctrine

in the Western Hemisphere. Its most spectacular application was the abduction of Venezuela's president, Nicolás Maduro, and his detention in the United States to stand trial on charges of "narcoterrorism."

Regarding Brazil, the U.S. government later rolled back a significant portion of the additional 40% tariff. Brazilian exports to the United States fell 6.6% in 2025, to US\$37.716 billion, from US\$40.368 billion in 2024. The decline is attributed to the tariffs imposed by the Trump administration. Over the same period, Brazil's imports of U.S. products grew by 11.3%, reaching US\$45.246 billion, resulting in a US\$7.530 billion trade deficit for Brazil. Negotiations over further tariff reductions are ongoing. A personal meeting between Lula and Trump is expected to take place at the White House in 2026.

January 12, 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

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.

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 (Pecequilo 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.

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?

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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 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

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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”.

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.

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-Brazil: 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.

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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.

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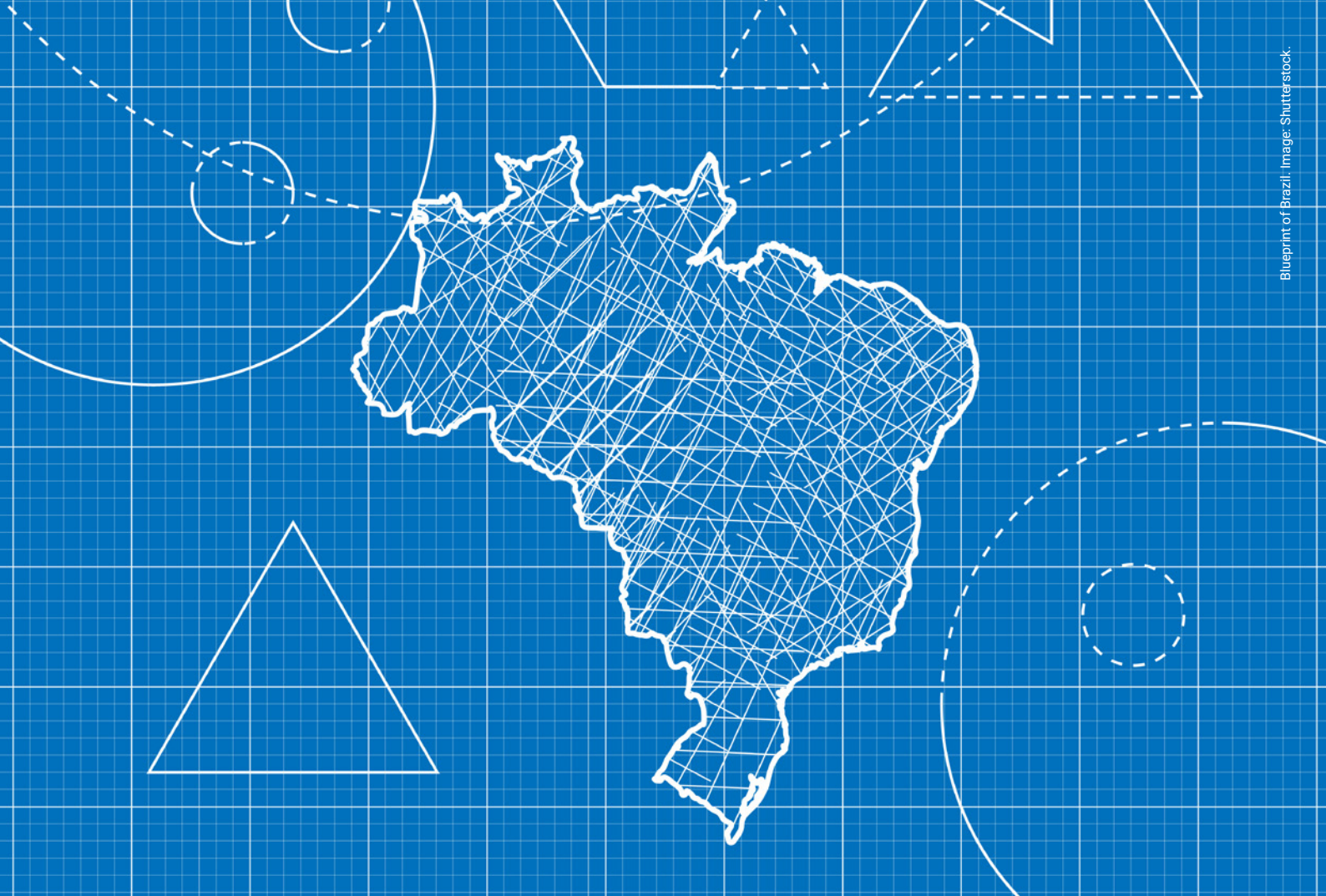
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External Peril, Internal Fatigue: Toward a Reconstruction of Brazilian Statecraft
Philip Yang

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 delinea 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.

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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.

Milei's Argentina and Lula's Brazil in the Face of Trump II's First Year
Esteban Actis

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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 U.S. 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.

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

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*.

The presidential elections in the United States have always been an important systemic variable for Latin America, given the centrality of Washington for the international insertion of the countries in the region. This dynamic has been accentuated over the last decade as US foreign policy has become more government-driven than State-driven, following the rupture of bipartisan consensus on the US's role in the world (Kanji 2025). Washington has become more volatile and unpredictable in its external actions (Yarhi-Milo 2025).

For the governments of Javier Milei in Argentina and Lula da Silva in Brazil, the results of the November 2024 elections in the United States marked a turning point in terms of external permissibility (Jaguaribe 1979). Donald Trump's decisive triumph over Kamala Harris, on the one hand, empowered and oxygenated the political project of the libertarian government in Argentina, and on the other, became a restrictive and adverse force for the domestic and external interests of the government of the former metallurgical leader in Brazil.

This perception of the differing effects on Buenos Aires and Brasília, held prior to Trump taking office (Actis 2024a), was largely confirmed over the first year of the Trump II administration, as the trajectory of White House actions unfolded. The implementation of the Trump Corollary to the Monroe Doctrine (Winter 2026) not only entailed greater pressure and influence across the so-called Western Hemisphere (Romero et al. 2025) but also constituted open interference in the internal affairs of Latin American states (Carothers & Stuenkel 2025).

In this context, this essay aims to analyze the dynamics of the bilateral relationship between the United States and Argentina and Brazil—from January 2025 to January 2026—and to conduct a partial, comparative evaluation of the strategies pursued by Buenos Aires and Brasília, as well as their outcomes.

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ARGENTINA'S ALIGNMENT STRATEGY: "CARROTS" AND LATENT VULNERABILITY

Since December 2023, Javier Milei's government has pursued a clear strategy of alignment (Russell & Tokatlian 2013), marked by the subordination of foreign policy to its relationship with the United States and a clear pullback from regional policy. The coupling strategy pursued by several Latin American governments in the 1990s was the status quo of the international order, the so-called *pax americana*. However, since the intensification of questioning of the "rules-based order" originates from the White House itself, the Milei administration supports and contributes, from the periphery, to the erosion of multilateralism and of an institutionalized international society. There is a critique rooted in the ideology of the alt-right (Merke & Pereira Doval 2024) towards the functioning of the liberal international order/institutionalism, whose closest Latin American antecedent was the experience of Brazil under Bolsonaro's government (Casarões & Barros Leal 2022). In that context, the Milei government has supported, and at times overplayed, various foreign policy actions to curry favor with Washington. For example, at the CELAC-China Summit held in May 2025 in Beijing¹, Argentina sent a third-line representative and was the only country to decline to sign the final declaration².

Argentina's alignment with Trump II is evident in Milei's international trips and in voting patterns at the United Nations General Assembly. In 2025, Milei traveled to the US 7 times (30% of his departures from the country) and, for example, has not visited Asia since becoming President. The report 'Voting Practices in the United Nations 2024' from the Department of State (2025) indicates that in

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1. Milei's government cooled its political relationship with China, but not its economic and trade ties. Unlike other emerging economies that sought to curb the oversupply of Chinese goods amid Trump's renewed trade war, Argentina was among the countries that most increased imports from China, while significantly liberalizing foreign trade.

2. Other examples include Argentina's dissociation from the UN "Pact for the Future" in September 2024; the withdrawal of its delegation from COP29 in Baku, Azerbaijan, in November 2024; the decision to withdraw the Argentine Republic from the World Health Organization (WHO) in February 2025; and Milei's absence from the G20 Summit in South Africa in November 2025.

the UN General Assembly, Argentina voted with the US on 82% of occasions. One must go back to 1962 (in the context of the Cuban Revolution) to find such a high level of voting alignment between Argentina and the United States. Although there are no official data for 2025, it is expected that, with Trump in the White House, this percentage will exceed 90%.

Unlike other attempts at alignment between Argentina and the United States, such as those during the governments of Carlos Menem (1991–1999), the Milei administration received one of the few “carrots” that Trump II extended to the region amid multiple “sticks” (Eurasia Group 2026): a heterodox reward, namely Treasury Secretary Scott Bessent’s decision to do “whatever it takes” to prevent a currency run in Argentina in the lead-up to the country’s midterm elections in October 2025. In addition to allowing a currency swap, the Treasury directly intervenes in the currency market by purchasing pesos³ to stabilize the country’s currency amid currency crises, devaluation and high domestic risks (Setser & Paduano 2025). At the bilateral meeting Milei held at the White House in October 2025, as well as during Bessent’s visit to Buenos Aires, it became evident that Milei and his political circle have access to Trump and his top officials.

A potential electoral defeat of Trump and the Republicans in the 2026 midterms could alter the balance of power in Washington and, therefore, recalibrate the type of support and instruments toward a country like Argentina. In such a scenario, the Argentine government has no plan B.

Both Argentina and Brazil were subject to a 10% baseline tariff increase in early April 2025 as part of “Liberation Day.” However, their paths diverged in the second half of the year. While Trump imposed 40% tariffs on Brazil and clashed with Lula and Brazilian institutions, Argentina began negotiating a trade agreement (White House 2025a) that already has a framework⁴ with commercial commitments. The document notes the existence of an Economic Security Alignment and a framework to facilitate trade and investment in critical minerals. Under the

3. Since 1971, the U.S. Treasury has intervened directly in foreign exchange markets of third countries on four occasions: Japan (1998 and 2011), the European Union (2000), and Argentina (2025).

4. From the outset of his administration, Milei has sought to negotiate a free trade agreement (FTA) with the United States through a flexibilization of MERCOSUR—an approach not supported by Trump’s mercantilist vision. Given the constraints in Washington, Argentina has instead pursued a partial agreement that includes not only tariff-related commitments (such as exceptions to MERCOSUR’s Common External Tariff, CET) but also non-tariff issues, including intellectual property, access to natural resources, trade facilitation, and digital trade, among others.

Biden administration, Milei's government signed an MoU with the United States to strengthen cooperation in critical minerals (US Mission Argentina 2024). In a context of geoeconomic fragmentation (Aiyar et al. 2023) and the search for secure supply chains, Argentina—like Brazil—gains relative importance.

However, the Milei government's alignment strategy is not with the United States as such, but with the Trump administration—hence its main vulnerability. Argentina lacks a lender of last resort⁵, which has led to the unusual provision of financial assistance from the US Treasury. Until the country regains access to international markets (through a significant decline in country risk), both the economic model and its political strength rest on expectations of a bailout from Scott Bessent. Democratic Party lawmakers have expressed opposition to financial assistance (Sánchez 2025), demonstrating that Milei's government is part of the strong political polarization currently experienced in Washington⁶. A potential electoral defeat of Trump and the Republicans in the 2026 midterms could alter the balance of power in Washington and, therefore, recalibrate the type of support and instruments toward a country like Argentina. In such a scenario, the Argentine government has no plan B.

BRAZIL AND HEDGING: “STICKS” AND NEGOTIATING RESILIENCE

Biden and Lula developed a presidential-level synergy between 2023 and 2024, due to their domestically polarized political agendas, despite important divergences on specific issues (Hirst & Valls Pereira 2024). The Biden administration played a decisive role in discouraging the attempted coup d'état backed by Bolsonarism in January 2023. Trump's return to the White House represented a challenge both to the clear hedging strategy in foreign policy implemented by Lula III (Kalout & Sá Guimarães 2022; Spektor 2023) and to his domestic political strategy, given the external empowerment it provided to the Bolsonaro family.

The bifurcation of external strategies between Argentina and Brazil became very clear from 2025 onwards. Under Lula III, Brazil opted to reinforce its multi-alignment strategy, seeking to diversify its foreign and trade relations as much as possible to avoid pressure from major powers, a strategy further reinforced by Trump's return (Stuenkel

5. Argentina already has an active IMF program and maintains a swap line with the People's Bank of China—both considered sources of last-resort financing, typically accessed when market financing becomes unavailable.

6. The exchange on X between Treasury Secretary Scott Bessent and Senator Elizabeth Warren (October–November 2025) centered on a currency swap of up to US\$20 billion from the U.S. Treasury (via the Exchange Stabilization Fund) to support the Milei government. Warren repeatedly denounced it as a political “bailout” for a Trump ally, benefiting hedge funds and Wall Street while neglecting domestic U.S. priorities (affordable healthcare, affected farmers, and the risk of a government shutdown). She called for transparency, criticized the lack of disclosure, and sought to block it (including through proposed legislation such as the “No Argentina Bailout Act”).

2025). In 2025, Brazil's President undertook three trips to Asia (March, May, October), visiting Japan, Vietnam, China, Indonesia, and Malaysia.

Unlike Argentina, where the government secured access to the White House, in Brazil, it was the circle around Eduardo Bolsonaro that achieved a rapprochement from January 2025. Tariff measures and sanctions against Alexandre de Moraes, a justice of Brazil's Federal Supreme Court (STF), can be partly explained by this lobbying capacity. In late July 2025, Brazil received Trump's "sticks"⁷, with the particularity that the demands were not commercial but rather domestic: to influence Brazilian institutions in the judicial process against Jair Bolsonaro.

In the face of the White House's onslaught, Lula's government remained firm in both its rhetoric and its threat of retaliation⁸. Unlike other actors that quickly entered negotiations with Trump from a position of weakness (such as the European Commission), Lula understood that Trump's demands were impossible to meet, but that, at its core, Washington had long-term strategic interests in an actor that falls into the category of a Geopolitical Swing State (Cohen 2023; Actis 2024b), where there was room for negotiation. Brazil's disadvantage—stemming from the lack of personal rapport between the presidents (an element present in Argentina under Milei)—was offset by Brazil's structural weight in the hemisphere, consistent with the traditional notion of a Pivotal State (Chase, Hill & Kennedy 1996).

Brazil's strategic reserves of rare earths (still largely untapped) have become a central issue in the bilateral relationship amid the United States' efforts to reduce its dependence on China. At the same time that Foreign Minister Mauro Vieira has sought to open channels of dialogue with Trump's officials (especially Marco Rubio), Brazil's business sector has exercised the lobbying capacity that the government itself has lacked vis-à-vis Trump and the White House.

7. Trump described the trial against Bolsonaro as a "witch hunt" and used sanctions as a tool of pressure (including economic and personal sanctions under the Global Magnitsky Act), alongside 40% tariffs on Brazilian exports (via the IEEPA), in an effort to influence Brazil's Supreme Federal Court (STF). The objective was to protect U.S. interests and support Bolsonaro, who was sentenced to 27 years in prison by the STF in September 2025.

8. Lula threatened retaliatory measures and explicitly invoked the possibility of applying the Economic Reciprocity Law (also referred to as the Commercial Reciprocity Law).

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The bilateral meeting between Trump and Lula in Malaysia (October 2027) marked a new phase in the relationship, opening a round of negotiations that culminated in Trump's modification of the tariffs imposed⁹ and the removal of sanctions against Alexandre de Moraes. Unlike Argentina, where trade negotiations are oriented toward a broad agreement, Brazil's deal consisted of a rollback of tariff measures, without additional trade commitments. At the same time, Brasília and Washington began to explore avenues for cooperation on rare earths, which could culminate in a bilateral agreement in 2026 (Pooler, Hodgson & Stott 2026). It is worth recalling that in August, the Development Finance Corporation (DFC) approved a \$465 million loan for the Serra Verde mine in Goiás—the only producing rare earths operation in Brazil—as well as a \$5 million disbursement for feasibility studies (Bloomberg 2025). In times of geoeconomic fragmentation, minerals become a strategic asset for Brazil and much of South America.

FINAL REFLECTIONS

Donald Trump's return to the White House became the main systemic variable shaping the political trajectories of Argentina and Brazil, with implications for both their domestic arenas and their international positioning. Considering the interpersonal ties forged (with Milei and Bolsonaroism) and the centrality of Latin America in the foreign policy of Trump's new administration

9. A broad list of agricultural products (238 HTSUS codes plus 11 additional categories) was excluded from the additional 40% tariff, including coffee, tea, tropical fruits and juices, cocoa, spices, bananas, oranges, tomatoes, beef, coconut water, açai, and others. These products are now subject only to the 10% baseline tariff (or less, where prior preferences or exemptions apply, such as under Section 232 in some cases) (White House 2025b).

(something not seen in Washington since the 1980s), there is no precedent in the 21st century of a first year of a US presidency exerting such influence over the political, economic, and international trajectory of Buenos Aires and Brasília. In turn, this variable clearly became a centrifugal force in the bilateral relationship between South America's two principal countries, as antagonistic perceptions intensified (Actis 2025).

In this context, the present essay seeks to highlight the divergence in the trajectories of the Milei and Lula governments vis-à-vis Trump's United States, based on the analysis of different indicators, which are summarized in the following table:

	Argentina-Milei	Brazil-Lula
External Strategies vis-à-vis Trump II	alignment	<i>hedging /multi-alignment</i>
Primary Instrument Applied by the United States	carrots	sticks
Sanctions Imposed on the Country	none	Sanctions on Alexandre de Moraes and others (Magnitsky Act)
Tariffs Imposed	10% <i>baseline</i>	40% (with exceptions)
Type of Trade Negotiations	broad agreement (<i>Framework On Reciprocal Trade And Investment</i>)	<i>deal rollback</i> (tariff reductions via IEEPA)
Political Access to the White House Decision-Making Circle	broad	restricted to the government/broad for the opposition (Bolsonarism)
Corporate Lobbying Capacity vis-à-vis the White House	low	high
Access to Critical Minerals/ Rare Earths	negotiated	in negotiation
Role in Goeconomic Fragmentation	supplier of raw materials	supplier of raw materials + <i>geopolitical swing state</i>

Table 1: Comparative summary of the governments of Milei and Lula against Trump II

Overall, this study shows clearly how the systemic variable under analysis became permissive for the Milei government and restrictive for the Lula government. However, beyond leveraging its alignment strategy to secure bilateral financial support (the major “carrot” Trump offered to a country in the region), Argentina continues to face political and economic vulnerabilities that are far from resolved, given its lower structural weight in the international system. For its part, Trump’s “sticks” toward Lula came at a cost. However, the deepening of hedging, an accurate reading of negotiating capacity, the role of the private sector, and Brazil’s condition as not only a provider of key raw materials—like Argentina—but also an actor with weight in the context of great power competition (a geopolitical swing state), have given it resilience in the face of an adverse international environment. ■

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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

Flavio Celio Goldman

Gabriel Fernandes Pimenta

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, Brazil. 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 Wallensteen

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 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.

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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. ☐

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.

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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

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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.

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).

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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

The Brazil-ASEAN Axis: Trade, Growth and Strategic Opportunities 175

Eugênia Barthelmess



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

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

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

Eugênia Barthelmess

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.

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

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.

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*

“The truth is that there were only great powers in Europe, and today they are the first to recognize that there is in the New World a great and powerful nation with which they must reckon and which necessarily must have its share of influence in the international politics of the whole world” (Lins 1995, 318). Thus spoke the Baron of Rio Branco in 1905, in a dispatch to the newly inaugurated Brazilian embassy in Washington. The civil war that pitted the industrialized North against the rural, slave-owning South had already ended 40 years earlier, and the United States appeared on the international scene as an increasingly imperial economic power, supported by steel, oil, railroads, manufacturing, urbanization, and rapid social transformation. Rio Branco “did not miss the vision of this phenomenon, which was that of international power being divided, at the end of the 19th century, between Europe and the United States,” recalls Álvaro Lins (1995, 317) in his classic biography of the Brazilian chancellor.

Not all foreign policy makers at that time possessed the same foresight. The Argentine legation in the US capital, which, like the Brazilian legation, had been operating since 1824, would only be elevated to the status of an embassy in 1914. Without neglecting its relationship with Europe, at the beginning of the 20th century, Brazil decided to present itself as the main South American interlocutor with the US, seeking to consolidate its regional visibility and expand its international

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projection. Argentina, on the other hand, chose to continue prioritizing its insertion into a European system anchored primarily in the United Kingdom, which it insisted on perceiving as the central axis of the international framework as a whole. It can be argued that this contrast was decisive in shaping the subsequent geopolitical orientations of the two countries and had long-term effects on their respective economic development processes.

Argentina's strategy of prioritizing its traditional ties with Europe, to which it exported its agricultural products and on whose capital and markets it depended, would continue to bear fruit for another couple of decades, certainly until the 1930s. In the mid-1940s, however, the Brazilian economy, by investing in the development of its industrial base¹ within an economic framework centered on the United States (US), surpassed the Argentine economy for the first time, weakened by the disaster of the two great European wars. From then on, the neighboring country would no longer manage to overcome its relative economic decline in relation to Brazil, which would consolidate itself as the largest economy in Latin America and, since the mid-1970s, as one of the largest in the world.

However, shifts in the world system's center of gravity happen with surprising speed.

At the end of 2025, we are a long way from 1991, when the spontaneous dissolution of the Soviet Union inspired the mirage of an end to History² that would ensure the preeminence, as far as the eye can see, of Washington's perspective on the course of the international scene. Paradoxically, it was from that moment of apparent triumph that the normalization of practices was established, which, over the following decades, would generate serious, concrete limitations for the victors of the Cold War's economies. Policies of deregulation, deindustrialization, widespread privatization, reduction of taxes

Without neglecting its relationship with Europe, at the beginning of the 20th century, Brazil decided to present itself as the main South American interlocutor with the US, seeking to consolidate its regional visibility and expand its international projection.

1. The creation of the National Council for Industrialization, a state body for planning Brazilian industrial development, dates back to 1941. The same year saw the founding of the Companhia Siderúrgica Nacional (CSN) in Volta Redonda (RJ), which began receiving financing and technical support from the United States under the terms of the so-called Washington Agreements (1942). CSN was essential for Brazilian steel production, the basis for the national development of heavy industry.

2. The American political scientist Francis Fukuyama (1992) argued, in *The End of History and the Last Man*, that so-called liberal democracy, associated with market capitalism, had definitively established itself as the dominant global model in a world that had overcome the Cold War.

on capital and a focus on financial capitalism to the detriment of the real economy would contribute to the concentration of income, the abandonment of investments in physical infrastructure and the important and undeniable relative impoverishment of the middle class³ in the United States.

We are now a long way from 2001, when, upon joining the World Trade Organization, China embarked on a lightning-fast process of integration into the global economy—of which it became the key player—and, at the same time, the formation of a gigantic domestic middle-class consumer market. The consequences, for China itself, Southeast Asia, the so-called Global South, and the world, would be profoundly transformative.

The United States' share of global trade in goods, which peaked in the post-war 1940s at about one-third of the total, and still accounted for about 25% in the 1970s, began to decline significantly from the 1980s onwards, as the international rise of the Japanese and West German economies took hold. Despite the success of the US strategy of containing German and Japanese competitiveness⁴, the US continued to lose ground through a gradual but continuous disengagement from the global economy. Its degree of trade openness, measured as imports and exports relative to GDP, has not kept pace with the global trend. The unprecedented pace of China's incorporation into global value chains and the 2008 financial crisis accelerated this contraction⁵. In

The United States' share of global trade in goods, which peaked in the post-war 1940s at about one-third of the total, and still accounted for about 25% in the 1970s, began to decline significantly from the 1980s onwards, as the international rise of the Japanese and West German economies took hold.

3. In "Capital in the Twenty-First Century", French economist Thomas Piketty (2013) discusses the relative impoverishment of the American middle class in a context of increasing income inequality. In the third part of the work ("The Structure of Inequalities"), the author compares labor income and capital returns, diagnosing a trend in favor of the capture, by an increasingly smaller minority, of the benefits of the country's economic growth.

4. The so-called Plaza Accord, signed in 1985 by the US, Japan, West Germany, France, and the United Kingdom at the Plaza Hotel in New York, promoted the coordinated devaluation of the dollar against the yen and the mark, with the successful objective of causing a decline in Japanese and German export competitiveness. In the same year, US sanctions against Toshiba considerably weakened the company, an emblem of the industrialization and internationalization of the Japanese economy, signaling a reduction in Japanese participation in the global trade of goods. The strategic autonomy of Japan and Germany is limited, where US troops have remained stationed since the end of World War II. The same cannot be said of China, the main trading partner of most countries, which is impervious to strategies of this kind.

5. As a result of the exacerbation of policies favoring the financial economy at the expense of the real economy, the 2008 crisis generated recession, unemployment, a drop in consumption, and a consequent reduction in American imports. The fall in production, credit, and investment, in turn, had a negative effect on the export dynamism of the US.

the current reality of global trade in goods, estimated at US\$ 50 trillion by 2025, the US exports US\$ 2.12 trillion and imports US\$ 3.15 trillion. China exports US\$3.63 trillion and imports US\$2.63 trillion. The United States, therefore, accounts for 10.6% of global trade in goods, while China leads with 12.5% (World Trade Organization 2025; UNCTAD 2025)⁶.

In terms of industrial capacity, China surpassed Japan in 2005, the US in 2008, and the European Union in 2011. Recent World Bank data suggests that China's industrial capacity is approaching the combined capacity of the United States, the European Union, and Japan⁷. This trend shows no signs of reversing in the short- or medium-term. The usual caveats maintain that, although the volume of Chinese manufacturing output is unparalleled, the US and Europe are still ahead in high-value innovation. In practice, the increase in Chinese exports of high-tech goods (electric vehicles, industrial robots) and China's recent progress in the semiconductor industry demonstrate its leadership in technological innovation. Sanctions on exports to China of critical technologies related to chip production have accelerated Chinese domestic development in this area (Huawei, SMIC), signaling increasing autonomy from Western inputs. As the world's largest consumer market for technology, China is also a critical source of inputs and raw materials, dominating numerous global supply chains, from rare earths and lithium-ion batteries to solar panels and high-precision optical components.

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The United States has been losing ground in innovation, partly due to reduced federal funding for research and development (R&D), which reportedly fell from about 67% of all domestic R&D in 1964 to less than 20% in 2023,

6. In the context of global trade in services, which is on the order of US\$14 to 15 trillion (WTO and IMF, 2024 data), the US still leads, with about 17% of global trade, while China accounts for about 8%. China is making rapid advances in services, especially in digital services, engineering and logistics, and is increasingly investing in artificial intelligence, fintech and cloud computing.

7. Industrial production is generally measured by what is called manufacturing value added (MVA), which captures the net value of goods produced. Filters by country and by year in the World Development Indicators from the World Bank show China with an MVA of approximately US\$4.66 trillion, compared to US\$2.91 trillion for the US, around US\$2.5 to 3.0 trillion for the EU, and around US\$0.87 trillion for Japan (World Bank. World Development Indicators, 2025).

according to the National Science Foundation (2025). The American share of scientific output and engineering fields has been gradually declining, in parallel with China's rise in this domain. According to the World Intellectual Property Organization (WIPO), China has led in the annual number of patents granted since 2011 (WIPO 2024). In 2023, it held approximately five million patents in force, compared to approximately 3.5 million in the US (WIPO 2024). Although this indicator is not, in itself, synonymous with technological vanguard, China has established itself as a global champion in applied innovation—driven by its market scale, industrial execution capacity, speed of technological diffusion, sectoral leadership, rapid learning cycle, and growing power to set standards—surpassing Western economies in several key segments.

The International Monetary Fund's (IMF) October 2025 World Economic Outlook report indicates that, with regard to the global economic weight in purchasing power parity (PPP), the United States now accounts for no more than 15.5% of global GDP, with a trend toward contraction; the European Union, 16.5%, with a trend toward contraction; and China, approximately 19%, with a trend toward expansion (IMF 2025).

China	19 %
European Union	16,5 %
United States	15,5 %
India	7,1%
ASEAN	3,7 %
Japan	3,7 %
Brazil	2,2 %
South Korea	1,7 %
Canada	1,5%

Table 1 – Share of global GDP in PPP/2025. Source: WEO (2025).

The same source indicates that the weight of the Global South—which we will understand here as Emerging and Developing Market Economies (EDMEs)—added to China’s weight accounts for 60.64% of global GDP in PPP in 2025. Subtracting China’s share from the Global South, we arrive at 41.64% of the total, which is still a larger proportion than the combined presence of the US and the European Union (32%). If we consider the combined presence of the United States and the EU, plus Canada, Japan and South Korea (a group that we could roughly refer to as the Global North), the total in GDP/PPP would reach 38.9%, that is, still less than the combined weight of the Global South without China.

US + EU	32 %
US + EU + Japan + South Korea + Canada	38,9 %
Global South without China	41,6 %
Global South with China	60,6 %

Table 2 – North vs. South: share of global GDP in PPP/2025. Source: WEO (2025).

IMF data demonstrate that we are facing a historic reversal in the engine of economic power and reveal a profound structural change. The Global South, excluding China, already surpasses the Global North in GDP/PPP, outweighing the economies the IMF still refers to, with unintentional irony, as advanced economies.

One hundred and twenty years later, the US, a rising power in 1905, is now experiencing an undeniable relative decline in its share of global trade, industrial production, scientific and technological output, and world GDP. Its monopoly on military power is no longer certain either. The Chinese military parade on September 3, 2025, which marked the 80th anniversary of the victory over Japan in World War II, was considered by expert observers⁸ a critical milestone in China’s mastery of technologies that rival or surpass those of the United States⁹. The United States,

8. The 2025 annual edition of the Index of US Military Strength, published mid-year by the Heritage Foundation, a conservative American think tank specializing in defense and security, classifies US military power as “weak” for the second consecutive time, in contrast to Chinese advances in this area. Complementary analyses by the Heritage Foundation, released after the parade, refer to it as evidence of the “accelerated modernization” of the People’s Liberation Army (PLA). (The Heritage Foundation, 2025)

9. Hypersonic missiles and the so-called complete nuclear triad—nuclear bombers, intercontinental ballistic missiles (ICBMs), and submarine-launched ballistic missiles (SLBMs)—were all displayed in the parade.

which was an unavoidable actor until recently, now accounts for only about 13% of Chinese exports (UNCTAD 2025) and absorbs less than 12% of Brazilian exports (MDIC 2024).

The world has changed. The 20th century, the so-called American century, ended a quarter-century ago. We are no longer in a moment of transition, but in a moment of post-transition. The re-emergence of China as a power has established a new commercial dynamic in a transformed global economic reality.

As in 1905, the signs are more than clear. Reputable conservative sources, such as those cited here, confirm that a systemic reconfiguration has taken place, a shift in the center of gravity of global economic power. What is remarkable is that it is necessary to state what is evident, and that, in doing so, this may generate incredulity or arouse sensitivities. In the conventional discourse of the academic intelligentsia and Western opinion leaders, the dogmas of American exceptionalism and European centrality, and the desired collapse—always presented as imminent—of China’s capacity for sustained growth, continue to be recited today, as they have been for the last 30 or 40 years.

The re-emergence of China as a power has established a new commercial dynamic in a transformed global economic reality.

In his memoirs on the Sino-American rapprochement of 1972, Henry Kissinger wrote that China under the last imperial dynasty (1644-1912) entered the modern era dominated by a political elite “oblivious to the onset of the Western age of exploration” and “unaware of the technological and historical currents that would soon threaten its existence.” At the time, according to Richard Nixon’s Secretary of State¹⁰, there was no shortage of currents arguing that it was necessary to counter European advances by strengthening internal capabilities and adapting technologically. Supported by a conservative population, the prevailing faction, however, decided that adapting would be tantamount to abandoning the essence of Chinese heritage, which was perceived as invincible. “Centuries of predominance,” he concludes, “had warped the Celestial Court’s sense of reality” (Kissinger 2011, 49-63).

Whether due to ideological conditioning or cognitive inertia—as was the case on the eve of the capitulation to the British invaders by the courtiers of the Qing dynasty, like the Argentine elite in the 1910s—the still predominant Western analyses tend to privilege dogma over factual evidence, clinging to a past that is already gone.

10. And from Gerald Ford.

China's economic rise has transformed the balance of power in world trade. One effect of this transformation has been an increase in trade among actors in the Global South. By importing large volumes of raw materials and exporting affordable manufactured goods, Chinese expansion has not only increased bilateral trade between its own market and other developing markets but has also fostered new investments and trade agreements that have expanded the flow of goods and services within the South. This rise has promoted the integration of Southern economies into large supply chains, intra- and extra-regional networks, and increasingly resilient, diversified trade exchanges. Through trade realignments and the diversification of partnerships, it has produced increasing economic and commercial autonomy for the South vis-à-vis the United States and the European Union. IMF projections suggest the trend will continue, with the South's GDP growing faster than the North's¹¹.

Brazil, already a relevant player in this new context, has the conditions to continue adapting to the rhythm of technological and geopolitical cycles, which seem to be getting shorter and shorter, rejecting anachronistic interpretations and gathering the tools to make the best use of reality and position itself in an increasingly competitive way in the face of this new configuration.

RISE OF ASEAN

The world's economic and commercial axis has shifted to Asia. Or rather, it has returned to Asia after about 250 years during which it was exceptionally well anchored in the North Atlantic. It is in emerging Asia—China, India and Southeast Asia, extending far beyond the US tributaries Japan and South Korea—that the main source of global economic growth is found today, both in production and, with its immense markets, in consumption.

It is known that China is the main trading partner of about two-thirds of the United Nations member states; it has been, for 16 years since 2009, the country with which Brazil, for example, maintains the largest total trade volume year after year. However, the question of China's main trading partner is rarely raised.

It is known that China is the main trading partner of about two-thirds of the United Nations member states [...]. However, the question of China's main trading partner is rarely raised [ASEAN].

11. According to the IMF's World Economic Outlook, the South will grow approximately 2.5-2.7 percentage points faster than the North in 2025-2026, and this difference is expected to remain stable in the medium term. The same projections indicate that, without major shocks, the GDP of the South (in PPP) will reach approximately 65% of the global total by 2030 (IMF 2025).

For five consecutive years, since 2021, China’s main trading partner has been the Association of Southeast Asian Nations (ASEAN)—followed by the European Union, the United States, South Korea, and Japan. In 2024, the respective trade volumes were as follows (US Census Bureau & BEA 2025):

China-ASEAN	US\$ 982,34 billions
China-European Union	US\$ 848,23 billions
China-US	US\$ 688,34 billions
China-South Korea	US\$ 328,15 billions
China-Japan	US\$ 308,3 billions

Table 3 – Data from the US Census Bureau and the ASEAN Secretariat. US Census Bureau and Bureau of Economic Analysis, “US International Trade in Goods and Services, December and Annual 2024.”

ASEAN’s main partner, for the 16th consecutive year, is China itself, in a deep integration that extends beyond trade to include Chinese direct investment and integration into global supply chains. The closeness of the relationship stems from the facilitation of flows of goods, services, inputs, and investments promoted by the ASEAN-China Free Trade Agreement of 2005 and the Regional Comprehensive Economic Partnership (RCEP) of 2022, which will be examined later.

The current trade volume between ASEAN and China, exceeding US\$982 billion, represents approximately 16% of China’s total trade (MOFCOM 2025) and about 20% of ASEAN’s total trade (2024a). The proportion of trade flows (goods) between ASEAN and its major partners, excluding intra-ASEAN trade, is approximately as follows (ASEAN 2024b, 2024c):

ASEAN-China	21,8%
ASEAN-US	13,1%
ASEAN-EU	8,4%
ASEAN- Japan	7%
ASEAN-Others	49%

Table 4 – Proportion of ASEAN trade partnerships. Source: ASEAN Merchandise Trade Statistics 2024.

Created in 1967, ASEAN has been a free trade area since 1992, bringing together Brunei, Cambodia, the Philippines, Indonesia, Laos, Malaysia, Myanmar, Singapore, Thailand, East Timor, and Vietnam. Some of these economies (Indonesia, Malaysia, Thailand, the Philippines, and Vietnam) have considerable population and economic weight. Others, such as Laos or Cambodia, have shown signs of increasing dynamism. Together, these 11 countries are among the fastest-growing in the world. ASEAN's GDP has practically doubled over the last ten years and could double again over the next decade. Organized as an Association, Southeast Asia is one of the regions that has benefited most directly from the shift of the global center of the economy and trade to the East.

ASEAN is the result of remarkable success in building a regional integration structure amidst extreme diversity. Although geographically close, its members (to which Timor-Leste joined as a full member on October 26, 2025) are countries with extremely diverse languages, religions, cultures, and ethnicities. ASEAN encompasses hundreds of languages¹²[12] and multiple religions and ethnicities. Economic disparities, such as those between Myanmar (nominal GDP per capita of just over US\$1,000) and Singapore (nominal GDP per capita of US\$92,000), or population density, such as between Timor-Leste (less than 2 million inhabitants) and Indonesia (280 million inhabitants), have not impeded the fluidity of political coordination and commercial integration.

The free trade area (FTA) established in 1992 used a common preferential tariff, adopted through tariff-reduction schedules, to foster intra-regional economic integration and enhance the region's competitive advantages as a production base for the global market. The FTA evolved into a broader and more ambitious vision of integration, leading, in 2015, to the formation of the ASEAN Economic Community (AEC), which established a single market with the free flow not only of goods, but also of services and investments, capital and skilled labor¹³, to create an effectively integrated production and consumption platform. The ASEAN strategic plan for the 2026-2030 five-year period, known as the post-2025 Blueprint, is a natural evolution of the AEC's ambitions, focusing on digitalization, the green economy, resilience to global shocks, and the mitigation of development disparities among member states.

12. In addition to the official languages, which may be three or four per country, more than a thousand other languages are spoken by the different ethnic groups in the member states. In Indonesia alone, with its 17,000 islands, around 700 languages are spoken.

13. The free flow of labor is restricted to qualified professionals in specific sectors, which is regulated through mutual recognition agreements that prioritize the mobility of professionals in eight priority areas: medicine, dentistry, nursing, engineering, architecture, surveying, accounting, and tourism.

GROWTH PROSPECTS

In a context of accelerating economic and commercial globalization and the rapid enrichment of Asia from the 1980s and 1990s onwards, ASEAN was able to capitalize on the Asian miracle to integrate into global value chains. The regional GDP rose from about US\$ 500 billion in 1990 to more than US\$ 4 trillion in 2025, positioning the Association as the fifth-largest economy in the world, on par with India¹⁴.

What was, less than 40 years ago, a collection of poor economies dependent on the export of commodities and rudimentary manufactured goods has become a diversified, highly integrated economic powerhouse recognized as one of the world's leading hubs for manufacturing, technology, and services. Successful regional integration and an emphasis on industrial development and attracting foreign direct investment have been the cornerstones of this trajectory.

ASEAN is emerging today as an Industry 4.0 platform, with a strong position in advanced industries supported by systematic and deliberate regional policies. Initiatives adopted by common agreement promote joint projects in semiconductors, electric vehicles, and biotechnology, leveraged by investments from China and Japan. The manufacturing sector accounts for approximately 30% of regional GDP, growing at around 6% per year, with a focus on electronics (Malaysia, Vietnam) and automotive (Indonesia, Thailand).

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Economic growth projections for ASEAN until 2030 vary by country, but the consensus is for sustained expansion. Indonesia, the bloc's largest economy, is expected to grow at 5.1% per year, raising its GDP from US\$1.4 trillion in 2025 to US\$2.5 trillion in 2030, benefiting from natural resources and manufacturing. The Philippines and Vietnam, with rates above 6%, will reach US\$800 billion and US\$700 billion, respectively, driven by exports and foreign investment. Thailand and Malaysia project 4% to 5%, focusing on tourism and electronics, while Singapore,

14. The ASEAN Secretariat estimates in its Statistical Highlights, updated in 2024, that the Association's current nominal GDP would be between US\$3.98 and 4.0 trillion (Source: ASEAN Secretariat 2024c).

with 3% to 4%, maintains its leadership in financial services¹⁵. Countries like Laos and Myanmar, although more volatile, benefit from regional integration through the Regional Comprehensive Economic Partnership Agreement (RCEP), which I will discuss below and which is estimated to add US\$1.2 trillion to intra-Asian trade by 2030.

Regional GDP growth rates are projected to reach 4.8% in 2025, exceeding the global average of 3.2%, driven by exports (approximately 40% of ASEAN GDP) and tourism (5-10%). GDP per capita has grown by 4.5% over the past decade, from US\$3,500 in 2015 to US\$6,010 in 2025, reducing poverty from 16% to 6-7%, despite persistent disparities among Member States.

To sustain growth in production capacity that continues to meet domestic demand and its export potential, ASEAN relies on several positive structural factors. With over 690 million inhabitants in 2025—almost three times the population of Brazil (212 million)—the Association has a young workforce, with the demographic dependency ratio declining until 2030, in contrast to the aging trend in Western economies.

Urbanization is expected to remain a key driver of growth dynamics in Southeast Asia. Between 2020 and the end of 2025, it is estimated that 70 million people will have migrated to cities, raising the urbanization rate from 50% to 60% by 2030. According to the Asian Development Bank (ADB), this trend is expected to continue, requiring trillions of dollars in additional infrastructure investments, boosting sectors such as construction and services, and increasing labor productivity.

An emerging middle class could act as a key catalyst in this process. It is estimated that the middle-class segment of the ASEAN population, which numbered 91 million in 2010, will grow to 334 million in 2030 (51% of the population). The IMF estimates that the disposable income of this sector could grow by 56% in the so-called emerging ASEAN-5 (Indonesia, Malaysia, Philippines, Thailand and Vietnam). Combined with digital penetration (92% in Indonesia's urban

Southeast Asia seems prepared to overcome its internal bottlenecks and navigate global risks, such as the new US trade tariffs, while remaining a pillar of the world economy.

15. I used the Asian Development Outlook, published by the Asian Development Bank (ADB), which provides detailed GDP growth projections by country, extended, in some scenarios, to 2030 (ADB 2024, pp. 45-67 [for country projections] and p. 120 [for RCEP impact]).

areas by 2030), this expansion should boost domestic consumption, which already accounts for 60% of regional GDP¹⁶. E-commerce and fintech services could add US\$1 trillion to GDP by 2030, fostering sustained demand for consumer goods, education and health.

More than just a growing bloc, ASEAN presents itself, in short, as a resilient ecosystem where sharp intra-regional coordination, urbanization, favorable demographics, and the rise of the middle class converge to sustain growth and robust domestic consumption. Southeast Asia seems prepared to overcome its internal bottlenecks and navigate global risks, such as the new US trade tariffs, while remaining a pillar of the world economy.

ASEAN AND THE REGIONAL COMPREHENSIVE ECONOMIC PARTNERSHIP (RCEP)

The major Asian trade agreement, the Regional Comprehensive Economic Partnership (RCEP), brings together, in addition to ASEAN, China, Japan, South Korea, Australia, and New Zealand, a total of 16 economies. The RCEP was signed in November 2020 and has been in effect since January 2022. Covering 30% of the world's population, 30% of global GDP, and 28% of international trade, the RCEP is the world's largest trade agreement.

ASEAN played a key role in the success of the negotiations, which spanned from 2012 to 2020, acting as the central coordinator from the outset. The RCEP evolved from bilateral initiatives ASEAN+3 (China, Japan and South Korea) and ASEAN+6 (with the entry of India, which would withdraw from the negotiations in 2019¹⁷, Australia and New Zealand), with the definition of the agenda and rules of engagement always remaining the responsibility of ASEAN. The use of its characteristic diplomatic methodology—the so-called ASEAN way, based on consensus, flexibility and inclusive negotiations—

16. Manufacturing (30%) and tourism (5%-10%) are measured using the production method, which calculates each sector's contribution to GDP. Consumption (60%) and exports (40%) are components of GDP calculated using the expenditure method, which breaks down GDP into spending categories (consumption, investment, government, and net exports).

17. India officially announced its withdrawal from the negotiations on November 4, 2019, during an ASEAN summit in Bangkok, Thailand. The announcement was made in the final stages of the agreement's conclusion, which was to be signed by the other negotiators on November 15, 2020. Among the reasons cited for the decision were India's trade deficit with China, domestic pressures due to fears of a negative impact on vulnerable sectors (agriculture, manufacturing), and the failure to obtain specific concessions for certain Indian services (IT and pharmaceuticals).

Much less remembered is the fact that India was at that time being closely courted by the US, which wished to promote it as a pillar of an "Indo-Pacific" strategy (as opposed to the classic "Asia-Pacific" concept) for the region, in an effort that ultimately did not yield the expected results. India's withdrawal from the RCEP corresponded, at that moment, to a tacit alignment with American interests, especially amidst the US-China trade confrontation. Today, we see the arbitrary imposition of US tariffs on India, an India-Russia rapprochement driven by Indian acquisition of Russian energy, and India's pursuit of greater understanding with China. The withdrawal from the RCEP meant the loss for India of preferential access to important regional supply chains; the agreement leaves the door open for the country to rejoin in the future.

streamlined the process by centralizing decisions, reducing duplication and ensuring that negotiations progressed in annual rounds under the Association's rotating presidency.

The RCEP provides States Parties with, among other benefits, the elimination or reduction of tariffs, cumulative rules of origin known as "diagonals," investment facilitation, and standardization of digital trade. The agreement eliminates or reduces tariffs on more than 90% of goods within 20 years, with extended deadlines for least developed countries (up to 25 years for Cambodia). Its diagonal rules of origin, based on 40% regional value added, allow inputs from any State Party to be counted towards preferential qualification. Investment facilitation is conducted through negative lists (automatic liberalization except for explicit reservations), prohibition of performance requirements (such as mandatory technology transfer, with transitional exceptions for least developed States Parties), and standardization of digital trade, with provisions on cross-border data flows and protection of personal information, without forced server localization by default. Customs facilitation aligns with the WTO Trade Facilitation Agreement, with goods cleared within 48 hours, equivalent to an additional 9% reduction in non-tariff barriers.

From ASEAN's specific perspective, the RCEP strengthens intra-Asian production and trade chains, encourages increased foreign investment, and enhances the competitiveness of each of the Association's members. The integration of its smaller economies, such as Vietnam and Cambodia, into networks led by China, Japan, and South Korea, especially in electronics and automotive sectors, is particularly welcome. The agreement further enhances the competitiveness of the member states by harmonizing intellectual property standards, competition, and support for small and medium-sized enterprises through cooperation committees.

With the exception of two or three articles published at the time of its entry into force, there do not appear to be any objective, comprehensive, and above all continuous analyses over time in the West on the effects of what is, in concrete terms, the world's largest trading instrument and the first in History to bring together China and Japan.

The scant press and think tank coverage of the new agreement tends, with a single instinct, to cultivate negative bias, emphasizing perceived deficiencies such as the absence of more robust clauses on intellectual property. Much criticized is the supposed lack of ambition in the tariff area, which is natural, however, in a commercial environment where, thanks to the pre-existing network of ASEAN

FTAs (with China, South Korea, Japan, Australia and New Zealand, and among the member states themselves), the cuts affect an already low tariff base, consolidating reciprocal advantages previously granted between the Parties.

The fact that a trade arrangement larger than that of the European Union, in effect for almost four years, tends to be ignored or minimized by expert observers reflects the reverence with which the sensitivities of the Celestial Court of our day are still regarded. The fact that the United States' historical partners in Asia—Japan, South Korea, Australia, and New Zealand—have joined the RCEP does not encourage professional commentators to admit that we are facing a watershed moment in Asian integration, whose innovative impact goes far beyond tariff and intellectual property issues.

Comprising the gigantic economies of China, Japan, and ASEAN itself, and encompassing e-commerce, competition, government procurement, harmonization of rules of origin, customs facilitation, trade facilitation, and supply chain integration, the RCEP has significant repercussions on trade relations among its members and between them and the world¹⁸. In the spirit of the last courtiers of the Forbidden City, silence seems to be the best way out in the face of a reality that can no longer be controlled.

For ASEAN, responsible from the outset for the efficient conduct of the negotiations, the new pact multiplies partnerships, expands economic resilience, and promotes inclusive growth within the Association. As supervisor of the implementation of the RCEP, the ASEAN Secretariat monitors its execution, coordinates dispute resolution, facilitates necessary revisions, and keeps the RCEP aligned with the objectives of trade liberalization, economic cooperation, and the promotion of regional trade integration. The RCEP reinforces ASEAN's centrality in the Asian economic architecture and positions ASEAN as an indispensable trading platform.

BRAZIL IN THE GLOBAL CONTEXT

Brazil is one of the world's major economies. Since 1975, it has been among the ten largest global economies in terms of nominal GDP, with only

18. "Civilizations die from suicide, not by murder," said Arnold Toynbee in a well-known passage from "A Study of History" (1934, 38). The United States withdrew from the Trans-Pacific Partnership (TPP) negotiations in January 2017, originally conceived as a tool to contain China's commercial expansion. Now in the form of the Comprehensive and Progressive Agreement on Trans-Pacific Partnership (CPTPP), which it adopted after the surprising US withdrawal, this instrument was signed in 2018 and includes 11 countries (Australia, Brunei, Canada, Chile, Japan, Malaysia, Mexico, Peru, New Zealand, Singapore, and Vietnam), seven of which are members of the RCEP. In 2021, China formally requested accession to the CPTPP, followed a few days later by Taiwan. The United States is not currently part of any significant formal economic arrangement in Asia.

three temporary interruptions—in the early 1980s, at the turn of the 2000s, and during the two-year period of the Covid-19 pandemic¹⁹. Outside of these intervals, it has consistently remained between fifth and tenth place worldwide, a consequence of the importance of its primary and industrial sectors in the formation of the national product. In purchasing power parity, Brazil currently ranks seventh in the world, reflecting the size of its domestic market and the relative purchasing power of its population.

The country occupies half of South America's area and accounts for half of its population; its GDP of approximately US\$2.36 trillion is equivalent to half of South America's GDP. A major global exporter, it is the largest oil producer in Latin America. It exerts leadership in multilateral discussions on trade and combating climate change; it is a member of both BRICS and the G20; it is currently presiding over the World Climate Summit; and it is universally appreciated for its conciliatory tradition and capacity for negotiation and mediation.

In the WTO's global trade ranking, Brazil is among the 25 largest exporters. In terms of agricultural products, it is one of the three largest global exporters, rivaling the United States and the European Union as a major supplier of food to large Asian markets. The country is the leading global exporter of soybeans, coffee, sugar, orange juice, beef, and chicken.

Commodities account for about 60% of Brazilian exports, with soybeans predominating as the main item (15% of external sales), followed by iron ore (12%, the second largest exporter in the world) and beef (6%)²⁰. Manufactured products account for about 35% to 40% of exports, driven by sales of vehicles, the aerospace and defense (Embraer) sectors, and steel. Considering both goods and services, a comparison between Brazil's main trading partners in 2024, the last year for which complete data is currently available, shows the following results²¹:

19. Between 1982 and 1984, during the external debt crisis and recession, it fell to 11th-12th position, impacted by the debt crisis and recession. From 1999 to 2006, currency devaluation and low growth led the country to positions 11th to 14th. More recently, between 2020 and 2021, the COVID-19 pandemic and the depreciation of the real resulted in a drop to 12th-13th, temporarily interrupting the consistent trajectory among the top ten economies, which has been maintained since 1975, notably peaking at 5th position in 2011.

20. In 2024, the eight main exported products included crude oil, soybeans, iron ore and concentrates, sugar, processed petroleum oils, coffee, frozen beef, and undissolved chemical wood pulp (MDIC 2024).

21. Sources: for the United States, MDIC (Comex Stat), Central Bank, Bureau of Economic Analysis (BEA); for China, MDIC (Comex Stat), Central Bank, General Administration of Customs of China; for the European Union, MDIC (Comex Stat), Central Bank, Eurostat; for ASEAN, MDIC (Comex Stat), Central Bank, IBRE/FGV; for Argentina, MDIC (Comex Stat), Central Bank, INDEC.

United States	US\$ 82,6 billions
China	US\$ 76 billions
European Union	US\$ 44,5 billions
Argentina	US\$ 12 billions
ASEAN	US\$ 10,7 billions

Table 5 – Values in US dollars that Brazil imported from its main trading partners in 2024.

China	US\$ 118 billions
United States	US\$ 54,4 billions
European Union	US\$ 47 billions
ASEAN	US\$ 26,56 billions
Argentina	US\$ 12,3 billions

Table 6 – Values in US dollars that Brazil exported to its main trading partners in 2024.

China	US\$ 194 billions
United States	US\$ 137 billions
European Union	US\$ 91 billions
ASEAN	US\$ 37 billions
Argentina	US\$ 24 billions

Table 7 – Trade flow (goods + services) between Brazil's main trading partners in 2024.

China, Brazil's main trading partner since 2009, absorbed almost 20% of Brazilian exports that year, resulting in a trade surplus for Brazil of around US\$42 billion. Brazil's trade with China accounts for 85% of the combined trade with its next two partners, the US and the EU.

The United States, the second-largest partner, accounted for less than 10% of exports, with a deficit against Brazil of around US\$ 28 billion, resulting from the import of manufactured goods, technology, and services such as royalties and profit remittances. Trade with the European Union totaled US\$ 91.5 billion (15.3%), with a slight Brazilian surplus of US\$ 2.5 billion.

Regarding ASEAN, the total trade flow, as observed, amounted to approximately US\$ 37 billion, with a robust surplus of US\$ 15.5 billion for Brazil (20% of the Brazilian trade balance surplus in 2024), placing the Association firmly among Brazil's top five trading partners (MRE 2025a; APEX Brasil 2025).

Brazilian foreign trade encompasses both strengths and vulnerabilities. While a solid commodity base sustains surpluses, greater diversification of the export portfolio is desirable to mitigate risks. A systematic policy of closer ties with ASEAN, coupled with initiatives in innovation, reindustrialization, and expanding trade partnerships, offers opportunities for Brazil to continue consolidating its global gains.

COMMERCIAL IMPORTANCE OF ASEAN FOR BRAZIL

ASEAN is emerging as a rapidly growing trading partner for Brazil. Trade (goods + services) increased from approximately US\$3.5 billion in 2002 to US\$37 billion in 2024, representing a more than tenfold increase in 22 years, driven by the competitiveness of Brazilian agribusiness and mining. Brazilian exports are concentrated in soybeans, iron ore, beef, sugar, and corn, with Indonesia and Malaysia being the main destinations for these products. Brazil imports from ASEAN primarily electronics and semiconductors (40%), machinery (25%), textiles (15%), and chemicals (10%).

Trade between Brazil and ASEAN has grown at an average of about 15% each year since 2020, contrasting with the relative stagnation of traditional markets.

Emblematic cases illustrate the supremacy of certain ASEAN members over Brazil's historical trading partners in Europe and Latin America. Driven by refined petroleum products and aircraft, exports to Singapore reached US\$7.9 billion in 2024—more than Brazil exported to Germany (US\$5.85 billion) and more than double what Brazil exported to France (US\$3 billion).

In 2024, trade with Malaysia reached US\$5.9 billion, with exports exceeding US\$4.3 billion and a surplus for Brazil of US\$2.8 billion. Brazilian sales were concentrated in iron ore (37%) and crude oil (28%). Brazil exported more to Malaysia in 2024 than to Italy, Portugal, the United Kingdom, or France (MRE 2025b).

Indonesia, with US\$4.5 billion in purchases (soybeans and soybean meal), surpassed the United Kingdom (US\$3.34 billion). Vietnam, with imports of US\$4.2 billion (soybeans and pork), surpassed Peru (US\$3.8 billion). Thailand, which bought US\$3.45 billion from Brazil (ethanol and chicken), surpassed France (US\$3 billion). These flows point to a diversified and resilient export portfolio, with room for

significant expansion of Brazilian exports as ASEAN continues on its path towards ever greater affluence and development (MDIC 2024).

The table below shows the eleven members of ASEAN, with the enormous diversity of economic and demographic profiles that characterize them, presented in descending order of volume of imports of Brazilian products²²:

COUNTRY	GDP	PPP	ECONOMY PROFILE	POPULATION	IMPORTED FROM BRAZIL IN 2024
Singapore	US\$ 565 bi	US\$ 92.000	finance	6 millions	US\$ 7,9 bi
Indonesia	US\$ 1,43 tri	US\$ 5.030	mining	284 millions	US\$ 4,5 bi
Malaysia	US\$ 445 bi	US\$ 3.140	electronics	33,9 millions	US\$ 4,3 bi
Vietnam	US\$ 485 bi	US\$ 4.741	manufacturing	102 millions	US\$ 4,2 bi
Thailand	US\$ 546 bi	US\$ 7.770	automotive	70 millions	US\$ 3,45 bi
Philippines	US\$ 497 bi	US\$ 4.350	services	114 millions	US\$ 2,12 bi
Cambodia	US\$ 48,8 bi	US\$ 2.870	agriculture	17,4 millions	US\$ 26 mi
Laos	US\$ 16,3 bi	US\$ 2.100	hydropower	7,8 millions	US\$ 23 mi
East Timor	US\$ 2,02 bi	US\$ 1.343	oil	1,5 millions	US\$ 21 mi
Myanmar	US\$ 64,9 bi	US\$ 1.180	agriculture	54,8 millions	US\$ 19 mi
Brunei	US\$ 16 bi	US\$ 34.970	oil	450 millions	US\$ 3 mi
TOTAL	US\$ 4,12 tri			690 millions	US\$ 26,56 bi

Table 8 – ASEAN member countries in descending order of import volume of Brazilian products.

As discussed above, the ASEAN countries represent a consumer market of 690 million people for Brazil (three times the Brazilian population), increasingly affluent, with a combined GDP equivalent to almost twice the Brazilian GDP. In this dynamic environment, which is a powerhouse of wealth and trade generation, there is enormous room for expansion for the entry of Brazilian products, both manufactured and from agribusiness.

22. Sources: for GDP and GDP per capita, IMF and World Bank estimates for 2025; for trade volumes (MDIC 2024).

BRAZIL'S INTEREST LIES IN THE GROWING RAPPROCHEMENT WITH ASEAN.

The partnership between Brazil and the Association is not limited to trade. In 2022, Brazil obtained the status of ASEAN Sectoral Dialogue partner, which it shares with seven other countries²³ and which confers a welcome degree of political institutionalization to contacts with the region. In December 2023, an action plan for the Brazil-ASEAN partnership, entitled “Areas of Practical Cooperation 2024-2028,” was adopted, defining concrete priorities for joint action. The plan’s axes prioritize coordination across trade and investment, sustainable agriculture, energy transition, digital connectivity, climate change, and global governance.

Brazil is the only ASEAN Sectoral Dialogue partner in Latin America. It is the only Sectoral Dialogue partner to maintain a permanent representation, opened in March 2024, with the ASEAN Secretariat, based in Jakarta.

The status of Sectoral Dialogue partner should not be confused, however, with that of Dialogue partner, which is more complex and comprehensive, that ASEAN maintains with China and the United States, or Japan and the European Union²⁴. Full dialogue (as opposed to sectoral dialogue, which focuses on specific topics) provides the partner country with participation in high-level forums, such as the annual ASEAN leaders’ summits and ministerial meetings across various areas, as well as broad strategic cooperation.

President Lula invited the Prime Minister of Malaysia, Anwar Ibrahim, to participate in the G20 and BRICS Summits, which Brazil hosted in Rio de Janeiro in November 2024 and July 2025. Upon Malaysia assuming the rotating presidency of ASEAN, Anwar Ibrahim reciprocated the gesture—despite Brazil not being a full dialogue partner—by inviting Lula, in the capacity of Guest of the Chair, to take part in the Association’s summit meeting held in Kuala Lumpur in October 2025.

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23. The following are the other partners in sectoral dialogue with ASEAN: South Africa, United Arab Emirates, Morocco, Norway, Pakistan, Switzerland and Türkiye.

24. The following are the partners in full dialogue with ASEAN: Australia, Canada, China, South Korea, the United States, India, Japan, New Zealand, the United Kingdom, Russia, and the European Union.

The unprecedented participation of a Brazilian head of state in the 47th ASEAN summit is a historic advance in relations between Brazil and the Asian bloc. It constitutes an eloquent milestone in Brazil's political rapprochement with Southeast Asia. It was a high point in President Lula's foreign policy during his third term.

On the sidelines of the ASEAN summit (October 26), the president made bilateral state visits to Indonesia (October 23), the region's largest economy, and to Malaysia (October 25), a major investor in Brazil's oil and gas sector. In Jakarta, he visited the Association's headquarters, where he announced Brazil's interest in becoming a full dialogue partner of ASEAN and in increasingly close political and economic coordination. In Kuala Lumpur, as in Jakarta, much was said about expanding bilateral trade and investment volumes with Brazil, which are already significant.

The external observer sees the Association as a cohesive bloc, supported by a formidable network of ASEAN+1 trade agreements²⁵ and, more recently, by the comprehensive provisions of the RCEP. For third countries, the high degree of intra-ASEAN coordination, as well as that between ASEAN and its major Asian counterparts, presents both opportunities and challenges. By valuing inputs from any country in the bloc, not just the final producer, the RCEP's diagonal cumulativity rule, as mentioned above, encourages the integration of internal production chains among the Parties. For an outside partner, there may be a risk of trade diversion, with reduced market access for actors outside the agreement; marginalization in global chains, with preference for regional inputs; and reduced competitiveness due to residual tariffs for non-members.

These issues reinforce, for Brazil as for any extra-regional partner, the need to mitigate risks in commercial relations with the Association. The path to concluding an agreement with ASEAN remains open, despite the complexities inherent in negotiations of this nature. Negotiations for a free trade agreement between ASEAN and the European Union were initiated, but due to limitations in its own internal coordination processes, the EU began to prioritize individual instruments with countries within the Association (EU-Singapore in 2019; EU-Vietnam in 2020). Formal discussions are underway between ASEAN and Canada and between ASEAN and the Gulf Cooperation Council. With MERCOSUR, an exploratory dialogue has been ongoing since 2007, without formal negotiations to date.

25. In descending order of effective date: ASEAN-Hong Kong Free Trade Area; ASEAN-India Free Trade Agreement; ASEAN-Australia-New Zealand Free Trade Area; ASEAN-Japan Comprehensive Economic Partnership; ASEAN-South Korea Free Trade Area; ASEAN-China Free Trade Area; and the ASEAN Free Trade Area proper.

Brazil has, through the FTA between MERCOSUR and Singapore²⁶, signed in December 2023 and is still pending internalization by the Parties, a trade instrument with an ASEAN member state. Whether or not the opportunity arises in the future to launch negotiations for a trade agreement between the two regional blocs, it seems certain that Brazil has an interest in the growing consolidation of its formal ties with ASEAN.

Beyond deepening economic and commercial complementarities, which are clearly of mutual interest, there seems ample room to diversify opportunities and for Brazil to propose new areas of coordination with ASEAN—from economic and financial dialogue to coordination in multilateral forums and the promotion of concrete cooperation across various spheres.

PERSPECTIVES

In a scenario of rapid geoeconomic transformations and acute global geostrategic instability, characterized by the unpredictability of the United States' political and commercial actions toward traditional partners and historical allies—and amid the apparent apathy of European leaders—the interest of Brazil in reaffirming the strategic importance of Southeast Asia is undeniable.

The trade relationship between Brazil and ASEAN follows its own dynamics, dictated by Brazil's strong competitiveness and growing Asian demand. Brazil, on the other hand, stands to gain by also deepening its political relationship with the bloc, seeking to secure increasingly higher levels of structural alignment with the Association.

The arbitrary trade sanctions that Brazil and other major exporters have been subjected to underscore the urgent need to diversify export destinations. While continuing to cultivate its significant portfolio of trade and political relations with the United States, Europe, and its MERCOSUR neighbors, Brazil has much to gain by pursuing a systematic policy of rapprochement with Asia and, within Asia, with the ASEAN countries.

For Brazil, vital issues are at stake, such as market diversification, increased exports, including those with higher added value, reduced exposure to volatile markets, attracting investment, and technological cooperation. Despite potential challenges (such as competition in manufacturing sectors), Brazil will benefit from investing in closer dialogue with ASEAN, aimed at overcoming logistical barriers,

26. The first FTA to be concluded between MERCOSUR and one of the ASEAN member states. A Comprehensive Economic Partnership Agreement (CEPA) between MERCOSUR and Indonesia and an FTA between MERCOSUR and Vietnam are currently under negotiation.

harmonizing sanitary standards, resolving specific trade irritations, and developing economic diplomacy in its broadest sense.

One of the most economically dynamic regions in the world, whose economic and geographic position makes it the epicenter of emerging global economic and trade competition, ASEAN emerges as an indispensable partner in reorienting Brazil's international insertion. In a world that has evolved and continues to transform, the Brazil-ASEAN axis strengthens Brazil's economic sovereignty, promoting necessary inclusive growth in alignment with predictable and lasting South-South partnerships. 🇧🇷

The trade relationship between Brazil and ASEAN follows its own dynamics, dictated by Brazil's strong competitiveness and growing Asian demand.

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BOOK REVIEW

Book Review of Luiz Feldman's "Sobre hemisférios:
capítulos de geopolítica brasileira" (Autêntica Editora 2025) 203

Leticia Pinheiro



Vintage Brazil map with quill. Image: Shutterstock.

On the Spoken and the Unspoken

Book Review of Luiz Feldman's "Sobre hemisférios: capítulos de geopolítica brasileira" (Autêntica Editora 2025)

Leticia Pinheiro

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Book Review of Luiz Feldman's "Sobre hemisférios: capítulos de geopolítica brasileira" (Autêntica Editora 2025)

Leticia Pinheiro

Geopolitics asserts itself on Brazil from time to time. External problems are not understood as secondary at these moments; they become existential. They demand as a response a fundamental definition of space, a taking of a position in the strong sense of the term, from which the country seeks to protect itself from dangers coming from outside and open the world, or part of it, to Brazilian influence (Feldman 2025, 19, translated by the editors)¹.

Reading this paragraph, which begins the Introduction to Luiz Feldman's

book *On Hemispheres: Chapters of Brazilian Geopolitics* (Autêntica Editora 2025), immediately reminds us of the US military intervention in Venezuela—codenamed Operation Absolute Resolve—which occurred on January 3, 2026. More precisely, it leads us to reflect on Brazil's position regarding the event itself and what it represents for the country.

Although indisputable, the relevance of this and other analysis by Feldman in this book is not limited to what happened at the beginning of this year. The fact that the sentence above was written before the episode in question actually reinforces the enduring relevance of the issues addressed in

1. All quotes were translated by the editors from their original version.

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the work when reflecting on Brazil's international insertion.

However, as Feldman himself states, “the concrete conceptions of regional order and extracontinental interest are (...) in a word, historical. They change over time, react to fluctuating circumstances and may deliberately contrast with each other. Formulated in specific contexts, they may transcend them, proving to be long-lasting or recurrent” (20). Moreover, because they are fundamental issues for the country, there will always be debates about them. And just as conceptions change historically, so too do their interpretations.

This work is undoubtedly a unique contribution to scholars and those interested in Brazilian political thought, particularly regarding its international dimension. However, its relevance is also undeniable for those dedicated to understanding foreign policy choices, the whys and hows they were made.

Addressing the tension between the distinct meanings of continent and

extracontinentality, Feldman leads us through the history of Brazil through the facts and reflections of its thinkers. As a diplomat and, more than that, as a scholar of “Brazilian international thought”—which he describes as “a layer subsequent to political and social thought and prior to diplomatic thought” (Feldman 2023)—the author analyzes, in four distinct chapters of the book, telegrams, letters, speeches, and various texts in which Paulino José Soares de Sousa, the Viscount of Uruguay, Joaquim Nabuco, Gilberto Freyre, and Afonso Arinos discuss and prescribe what the country's international behavior should be.

This work is undoubtedly a unique contribution to scholars and those interested in Brazilian political thought, particularly regarding its international dimension. However, its relevance is also undeniable for those dedicated to understanding foreign policy choices, the whys and hows they were made. In short, for foreign policy analysts. This is certainly not an original deduction. Feldman himself refers to this aspect of his work on several occasions and does so with the clarity and elegance that are characteristic of him, stating:

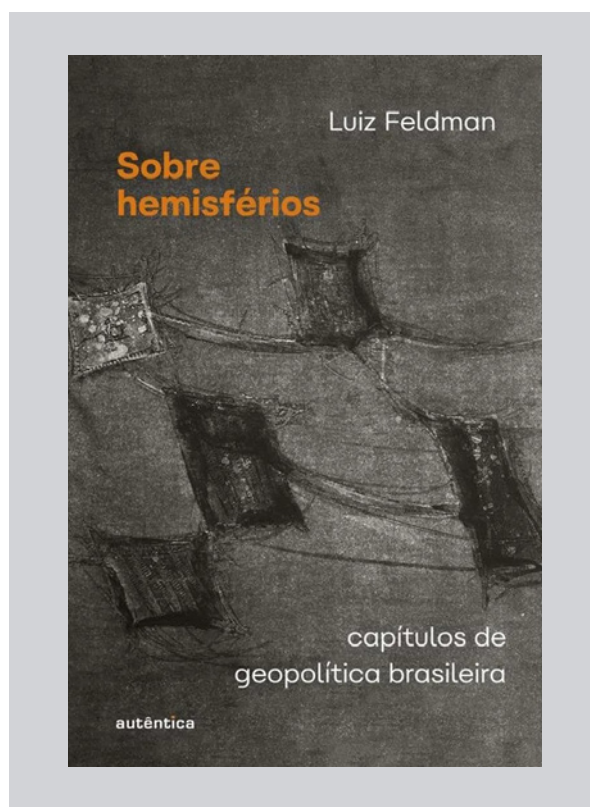
Each of these conceptions of regional order and extracontinental interest presupposes its own horizon. It is characteristic of concepts, in fact, to have both a descriptive and an

anticipatory dimension. This second quality makes them “diagnoses with prognostic intentions.” And, as anticipations of future scenarios, the concepts establish political and social horizons that guide action towards structural change and make this change visible and accessible (2025, 37).

Although the author states that, in this way, what he does is a “diplomatic history intertwined with an intellectual history” (ibid.), I argue that what he does, or rather, what he also does, when reflecting on diplomatic practice, is an analysis of foreign policy intertwined with the study of Brazilian international thought, anchored in two very rich sub-areas of Political Science.

It is in this intersection of knowledge that Feldman shows us how Brazilian diplomacy confronted geopolitics through the notions of: South America, between 1843 and 1866, examining the writings of the Viscount of Uruguay; the Western Hemisphere, from 1899 to 1909, by examining the diaries and letters of Joaquim Nabuco; the tropics, from 1948 to 1959, with Gilberto Freyre; and of the Southern Hemisphere, between 1961 and 1963, with Afonso Arinos.

Among the numerous aspects I would like to highlight from Feldman’s reflection on the Viscount of Uruguay’s thoughts on the greatness of Brazil and the centrality of South America,



one in particular caught my attention. By placing the Viscount at the starting point of the South American tradition of Brazilian diplomacy and attributing to the Baron of Rio Branco the position of his follower and no longer that of precursor of this orientation, Feldman simultaneously rescues the pioneering spirit of the former and grants the Baron a more temporal, I would even say more human, place, by relativizing his heavy reputation as the founder of almost all the traditions of Brazilian diplomacy.

Next, Feldman shows us the richness of visions that constitute our universe of great interpreters of the country when dealing with Joaquim Nabuco’s ideas about Brazil’s place in the world, which favored Monroeism as a regional order, in the name of Brazilian

security and survival. Here, instead of continental protagonism, Brazil's future is conceived and projected based on an alliance with the United States, in what Silva (1995) and others have called "ideological Americanism," in contrast to the "pragmatic Americanism" of the Baron of Rio Branco.

Next, once again demonstrating that the international dimension of Brazilian political thought is plural and diverse, Feldman takes us through Gilberto Freyre's reflections. Thus, we arrive at Freyre's "imperial internationalism," a curious equation that lends Brazil's plans of opening up and projecting itself across the oceans a hint of a domination project, grounded in the thesis of the country's bi-continental character. Furthermore, among the many other interesting facets of Freyre's thought that Feldman highlights, it is worth mentioning the racial question, which invites us to deepen its examination in the history of Brazilian diplomacy and foreign policy.

Finally, in the chapter on Afonso Arinos's and San Tiago Dantas's thoughts, Feldman uses process tracing, a method widely favored in foreign policy analysis. Thus, through the exchange of telegrams between Arinos and the then Chancellor Santiago Dantas, and through the memoirs of other Brazilian and foreign public figures, notably from Portugal, we see how Arinos's position on the colonial question (Angola, in particular) expresses a vision of Brazil's

Finally, to explain the title of this review, I would note that on another occasion [...], I discussed how the dual identity exercised by the Brazilian diplomat in the national arena came to be formed: the diplomat as an intellectual [raises] the issue of the unspoken, which is linked to the thesis that "agents are inevitably inscribed in social places, and their production is permeated by unspoken elements originating from (but not reducible to) the rules of organization of practices located in that place".

place in the world, more in line with its peers in the geopolitical South—to use a contemporary expression. We thus see a clear anti-colonialist counterpoint to Freyre's conception of extracontinental interest, which is undeniably colonialist.

The little we have written so far and the highlights mentioned do not correspond to a fifth of the many issues

and ideas that Luiz Feldman managed to unearth and bring together in a narrative as fluid as it is stimulating. In addition to the secondary sources consulted by Feldman, his research—drawing on the thinkers’ own writings, newspapers, and, especially, public and private archives in Brazil and abroad—reaffirms the importance of access to historical collections for a work of this caliber.

It is also impossible not to mention the quality of Luiz Feldman’s text. In fact, the writing, which is both agile and profound, which stands out for its enormous elegance, further enriches the substantive quality of this work. And as if that were not enough, Feldman explores the writings of the four figures, bringing them into dialogue with the varied opinions, discourses, and speeches of their contemporaries—almost as though he had witnessed these debates unfold in real time, rather than excavated them from the many sources he consulted.

Finally, to explain the title of this review, I would note that on another occasion, together with Paula Vedoveli, I discussed how the dual identity exercised by the Brazilian diplomat in the national arena came to be formed: *the diplomat as an intellectual* (Pinheiro & Vedoveli 2012, 211-254). In doing so, among other points, we raise the issue

of the unspoken, which is linked to the thesis that “agents are inevitably inscribed in social places, and their production is permeated by unspoken elements originating from (but not reducible to) the rules of organization of practices located in that place” (Pinheiro & Vedoveli 2012, 247-248). Or, in the words of de Certeau himself, “Certainly there are no considerations, however general they may be, nor readings, however far they may be extended, capable of suppressing the particularity of the place from which one speaks and the domain in which one conducts an investigation. This mark is indelible” (1982, 65). Thus, the author would also say, “It is therefore impossible to analyze historical discourse [and other knowledge] independently of the institution in function of which it silently organizes itself [...]” (1982, 71).

This, it seems to me, is also the case with this book, and it in no way weakens its contribution. On the contrary, I would go further and say it strengthens it and makes its reading even more relevant. An attempt, even if not explicit, to understand Brazil’s possible choices regarding its place in the world. A reflection on the sayings of the Viscount of Uruguay, Joaquim Nabuco, Gilberto Freyre, and Afonso Arinos, but also an invitation to think about the unspoken words of the four characters and the author himself. ■

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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.

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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

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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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