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Lula's Victory: Implications for Brazil's Foreign Policy and the U.S. Response



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Photo: Joe Biden speaks with Luiz Inacio Lula da Silva at the Progressive Governance Leaders' Summit in 2009. Source: Gardner Hamilton / AFP via Getty Images.

Luiz Inacio Lula da Silva has won Brazil's Presidential Election. His rival, Brazil's current President Jair Bolsonaro, while not saying the word "concede," has expressed his loyalty to the Constitution, has committed to allowing the transition to go forward, delegating his Chief of Staff Ciro Nogueira to lead it for his office, and has told his supporters not to be violent in their protests. The repeated expression of fears among those on the Brazilian and U.S. left that Bolsonaro would engage in a violent, authoritarian maneuver to subvert Brazil's democracy proved unfounded. Despite speculation to the contrary, Brazil's capable professional military respected the electoral process and stayed on the sidelines. The sky is not falling in Brazil, neither from Jair Bolsonaro's handling of the election results nor from Lula's

return to the presidency. Still, the lingering question remains: what will change?

The greatest impact of Lula's return will likely be on Brazilian foreign policy. The Biden Administration had positioned itself favorably with Lula. President Biden congratulated Lula on his victory in "free and fair" elections even before the Bolsonaro team had the opportunity to make public any concerns about the voting process. In moving forward, the Biden Administration and Lula will find a natural overlap in policy and discourse—from environmental protection and renewable energy to gun control and expanded protections for "historically disadvantaged" groups in both countries. Yet while such coincidences in the discourse of the two administrations will lead to positive interactions, the Lula's pursuit of foreign policy objectives in Latin America and the world will likely significantly undercut the position of the United States on a range of issues. These include the promotion of real democracy, rule of law and good governance, the resistance to deepening economic and other ties between the region and the PRC, as well as pushback against malign actors in the region such as Russia and Iran. However, Lula may actually be more critical of Russia's Vladimir Putin than was his predecessor.

As with what occurred during Lula's first administration, the President-elect will likely reserve his more leftist oriented foreign policy—competing for leadership of the newly-expanded Latin American left among a now crowded, if diverse, room of competitors. Today, the various orientations range between the populist authoritarianism of Nicolas Maduro in Venezuela, the ideological leftism with rhetorical flourishes of Gustavo Petro in Colombia, the more Central American and Caribbean-focused friendly populism of Andres Manuel Lopez Obrador (AMLO) in Mexico, and the principled stances of Gabriel Boric in Chile among others. With the contribution of Lula to this space, the United States will lose most of its remaining policies and strategic interests among these countries. Examples include—but are not limited to—isolating

and pushing for democratic change in authoritarian [Venezuela](#), [Nicaragua](#), and [Cuba](#).

Lula’s presidency will also advance the [revival of UNASUR](#), increased activism for the BRICS (including their possible [expansion to include Argentina](#)) and its associated [New Development Bank](#), and the institutional development and increased employment of the Community of Latin American and Caribbean States (CELAC). The new left-leaning multilateralism will also include new engagement opportunities for the PRC through the vehicles of both the BRICS (of which it is a member) and the [China-CELAC forum](#). A Lula government will also likely complicate the ability of the U.S. to advance its position in multilateral forums where it is present—from the Organization of American States (OAS) to the Inter-American Development Bank (IDB), among others. He may also give new life to transnational non-governmental initiatives such as the São Paulo Forum—which he started. Lula may also seek to involve Brazil in regional security issues—such as the “[total peace](#)” initiative in [Colombia](#)—in ways that may not fully coincide with U.S. interests there.

Lula will likely also facilitate Brazil’s deepening economic and political relationship with the PRC, which has recognized Brazil as a “[comprehensive strategic partner](#)” since 1993. However, he may not go as far as joining its “Belt and Road” initiative, which has [lost some of its luster](#) in recent years.

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Chinese government and its companies are already deeply engaged in Brazil, with China's USD \$66.1 billion in investment in Brazil by 2020 representing 47 percent of all investment by PRC-based companies in Latin America.

Chinese companies are engaged in Brazil at not only the national, but also the state and local levels. In addition, Lula, like Bolsonaro, will bring his own group of PRC skeptics back into power, generally tied to special interests within Brazil's left—such as organized labor. Yet as during his first period in office, Lula will likely be more disposed than Bolsonaro to encourage and engage in large state-to-state deals in sectors in a variety of sectors, particularly in spaces where PRC-companies have a significant established presence.

Concerning Russia, Lula may continue the policies of his predecessor in resisting the condemnation of Vladimir Putin. Although he may join some U.S. and European Union (EU)-led statements of concern that his predecessor did not, Lula's Global South-focused foreign policy and Brazilian interest in Russian agricultural markets and fertilizer, mean that he will likely maintain an ambiguous balance between the West and Russia.

In security affairs, Lula may also find it useful to “diversify” Brazil's military relationships. This could include limiting strong U.S.-Brazil security cooperation in gradual and subtle, but important ways. As a compliment, he could supplement Brazilian security interactions and arms transactions with partners of concern to the U.S. such as Russia and the PRC, as he did during his prior period in office.

Recommendations and Conclusions

The irony and danger of the positive relationship between Lula and the Biden administration is that the U.S. now finds itself transformed from its historic post-World War II role as a power leveraging its example and economic and

The U.S. seeks positive interactions by accommodating itself to the common ground it can find with its partner—at risk of not adequately pursuing its own strategic interests.

Although for Brazil, maintaining a good relationship with Washington is arguably not as much of a consideration in domestic politics as it is in other parts of the hemisphere, the U.S. should ensure that it uses its limited political and commercial leverage and goodwill with the Lula administration to encourage it to work constructively on the promotion of real democracy, human rights, and rule of law as well as on crime and security issues. The U.S. approach should include not just comfortable discourse about inclusion and inequality, but real help in limiting the advances of the region's most egregious violators of their constitutions, contractual and other legal commitments, and the human rights and democratic expression of their peoples—particularly in Venezuela, Nicaragua, and Cuba.

While respecting Brazil's sovereignty and friendship, the U.S. should make clear that attempts by Brazil to strengthen or revive multilateral groupings designed to exclude the U.S. from its legitimate role in hemispheric affairs—such as CELAC and UNASUR—or to deepen security and other strategically threatening cooperation with extra-hemispheric U.S. rivals—such as Russia, Iran, and China—will put a positive relationship with the U.S. at risk. Such candid, respectful expression of U.S. interests must be more than secondary talking points for U.S. diplomats. Instead, they must be credibly emphasized as core interests of the U.S. in its relationship with Brazil.

Brazil's election has shown the strength of its democracy under difficult and polarized circumstances. It is an important U.S. partner in the region. The overlapping political agendas of the Biden and incoming Lula administration and the diplomatic skill of the State Department team create a unique opportunity for the U.S.-Brazilian relationship to be positive. As the U.S. State

already doing with other governments of the new Latin American left—it is imperative not to confuse achieving a friendly tone with protecting U.S. strategic interests in the hemisphere.

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