
Multi-Alignment as Strategy: How Brazil Navigates Between Washington, Beijing, and the Global South

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Key Judgments

- **Brazil's enduring self-image as a “giant by nature” drives its foreign policy ambitions and contradictions.** Despite fitting the analytical mold of a middle power, Brazil's foreign policy elites have generally viewed the country as worthy of major power status. This explains its enthusiasm for high-profile groupings like BRICS and its skepticism toward alliances that could limit its strategic autonomy.
- **Brazil's foreign policy is defined by multi-alignment, not bloc politics.** Far from being passive “fence-sitters,” successive Brazilian governments have sought to balance ties between the United States and China as part of an active, broadly coherent foreign policy strategy. This approach has entailed engaging both major powers economically and technologically, while avoiding rigid alignment and continuing to push for reforms in global governance institutions like the United Nations and International Monetary Fund.
- **Regionally, Brazil largely remains a “leader without followers.”** Although it accounts for half of South America's population and GDP, Brazil has struggled to translate size into influence. Its limited willingness to underwrite regional integration or provide public goods has weakened its leadership. China's economic rise and U.S. frustration over Brazil's passivity in crises like Venezuela's underscore its constrained stature in Latin America.
- **The energy transition offers both opportunity and risk for Brazil's autonomy.** As a top producer of both oil and renewables, and with large critical mineral reserves, Brazil seeks to leverage its green credentials to lead on climate diplomacy (including hosting COP30). Yet it faces the dual challenge of avoiding a new “resource trap” while managing contradictions between its climate commitments and oil ambitions. Partnerships with both Washington (on biofuels and minerals) and Beijing (on renewables and infrastructure) epitomize this balancing act.
- **The Lula government's green diplomacy is central to Brazil's bid for leadership.** Hosting COP30 and presiding over BRICS and the G20 within the span of one year underscore Brazil's effort to recast itself as a Global South leader on climate and sustainable development. Yet contradictions between expanding oil production and ambitious climate rhetoric risk undermining credibility.
- **The U.S.–China rivalry poses Brazil's central strategic dilemma.** Brazil's economic dependence on China and security cooperation with the United States are both indispensable, making decoupling from either side untenable. Policymakers fear that worsening great-power competition will make multi-alignment costlier. Diversifying partnerships — via Europe, India, and the Global South — is thus seen as essential to preserving autonomy amid an era of growing geopolitical fragmentation.
- **As the U.S.-China rivalry intensifies, Brazil's ability to maintain balanced relations with both powers may be narrowing.** The emergence of exclusive technological and trade spheres may force Brasília to make choices it has long sought to avoid, raising the costs of strategic ambiguity.
- **Regional leadership will remain constrained without economic or security investment.** Brazil's reluctance to underwrite integration or provide tangible regional public goods limits its ability to shape outcomes in South America. Without meaningful commitments to infrastructure, security cooperation, or crisis management, Brazil will continue to be viewed as an indispensable but not fully engaged neighbor.
- **Technology governance is both a vulnerability and an emerging source of influence.** Brazil's decisions on 5G, artificial intelligence (AI), and data regulation illustrate its struggle to balance U.S. and Chinese pressures while maintaining digital sovereignty. By adopting the EU-inspired General Personal Data

Protection Act (LGPD) and promoting ethical AI standards under the G20, Brazil is positioning itself as a Global South reference in digital governance — but lacks the investment and innovation capacity to turn regulatory influence into technological power.

- **Brazil's partnerships with other middle powers are increasingly important but remain secondary to its ties to China or the United States.** Cooperation through IBSA, BRICS, and the G20 highlights Brazil's commitment to South-South diplomacy and multipolar reform. Yet unequal capacities among partners and China's growing dominance within BRICS limit Brasília's ability to turn these coalitions into vehicles for concrete influence.

Brazil's Role and Importance as a Middle Power

Brazil's national anthem declares the country “a giant by nature.” Brazilian politicians, diplomats, and pundits further this narrative, arguing that the country's influence stems not merely from its actions but from inherent characteristics, such as its size, population, and natural resources. This self-perception helps explain why many Brazilian policymakers are skeptical of the label “middle power.”¹ With 211 million inhabitants, Brazil is the world's sixth most populous and the fifth-largest country. Its sheer size has long fueled a persistent belief among its political elites that it deserves to be seen as more than just a middle power.

This produces a continuous tension not only between Brazil's foreign policy ambitions and its influence but also between its self-perception and the way others see and treat it. It also explains, to some extent, why Brazil was initially so enthusiastic about the emergence of the BRICS grouping (which originally consisted of Brazil, Russia, India, and China and expanded to include South Africa in 2010), as it implicitly equated the country's standing to larger powers included in the group.²

Brazil's long-standing official narrative of being an “emerging power” and a resource-rich “country of the future” gained momentum during the first decade of the 21st century thanks to high economic growth, fueled by Chinese demand for commodities, and significant progress in poverty reduction. China became Brazil's primary trade partner in 2009, a relationship that has only deepened in the 15 years since, pushing the United States to second place. The commodity boom and expanding markets also helped Brazil recover faster than other countries from the global financial crisis.

At the same time, Brazil's relationship with the world changed dramatically. The economic boom in the late 2000s, paired with political stability and the government's high approval ratings at home, served as the foundation for a period of unprecedented foreign policy activism, such as leading a challenging UN peacekeeping mission in Haiti,³ proposing the “Responsibility While Protecting” (RwP) concept for engagement during the military intervention in Libya,⁴ and seeking to negotiate a nuclear deal with Iran in 2010.⁵ Simultaneously, the creation of new multilateral groups like BRICS, IBSA (a trilateral grouping that consists of India, Brazil, and South Africa), and the Union of South American Nations (UNASUR) allowed Brazil to further assert itself in global debates. All this led foreign policy elites to embrace the notion that Brazil had finally become “the country of the present.”⁶

Brazil's growth as an emerging power has not been linear. The 2010s saw a massive reversal of expectations as Brazil entered a “lost decade” with near-zero percent growth, aggravated by short-term populist policies under President Dilma Rousseff. These deepened the economic malaise and led to a traumatic impeachment process in 2016 — and eventually the rise of far-right, anti-establishment, pro-Trump President Jair Bolsonaro, who posed a severe risk to Brazil's democracy and oversaw Brazil's temporary diplomatic isolation from the

West. Yet, in part thanks to U.S. pressure, a military coup was averted in 2023, and President Luiz Inácio Lula da Silva — who had previously led Brazil from 2003 to 2010 — has since sought to convince both domestic and international audiences that “Brazil is back.”⁷

After a period of destabilizing polarization, political risk has declined, politics has largely normalized, and economic growth has stood at around 3% per year.⁸ There is hope that the strong demand for green technologies and the materials required to build them, such as lithium, will set in motion another boom for Brazil in the coming decade.⁹ Recent discoveries suggest that between 19% and 23% of global reserves of rare earths are located in Brazil.¹⁰ The country also aims to become the world’s fifth-largest oil producer by the end of the decade, producing 5 million barrels per day.¹¹ In addition, Latin America’s relatively low geopolitical risk, particularly in a context of growing global tensions, may turn Brazil and the larger region into a more attractive investment destination, especially for companies keen to make their value chains more resilient to geopolitical uncertainty.

With this economic potential, there is little appetite across the ideological spectrum to disrupt ties with either China or the United States, or any other key actor in global affairs, such as Russia or Europe. While China is particularly important from a trade perspective, the Brazilian security establishment sees strong ties to Washington as indispensable. Instead, Brazil’s geopolitical stance broadly favors multi-alignment. President Lula favors multilateralism and envisions Brazil taking a leading role in issues such as the fight against climate change. Even former President Jair Bolsonaro’s government, which was more critical of multilateral institutions and embraced a pro-Trump rhetoric, preserved ties to China and largely pursued a foreign policy that can be described as nonaligned.

Brazil’s Policy Objectives

Foreign Policy Priorities

Brazil’s foreign policy centers on five key areas. First, it advocates for reform of global institutions like the UN Security Council and International Monetary Fund (IMF) to reflect a multipolar world, while still engaging with existing structures. Though Brazil helped found BRICS and supports alternative forums, it does not seek disruption. As Matias Spektor writes:

“The Brazilian establishment does not see itself as a challenger of the global order, even if in its eyes the world remains a nasty place dominated by a handful of powerful nations that will do what they can to keep the likes of Brazil in their place. The solution, it says, lies in piecemeal reforms to mitigate existing inequalities of power. Nobody in Brasília wants to rock the boat — just to make it bigger and more balanced.”¹²

Second, Brazil seeks to navigate the U.S.-China technology rivalry, especially in areas like 5G and artificial intelligence (AI), and avoid taking sides. Despite U.S. pressure, Brazil allowed Huawei’s participation in its 5G rollout, though it created a separate, secure network for government use. This balancing act risks becoming harder as technology spheres grow more divided.

Third, with demand rising for resources like lithium, Brazil aims to avoid repeating the “resource curse” that so often reduced its role to a mere commodity provider. As President Lula argued when launching the National Energy Transition Policy in 2024, “We are not going to throw away the meaning of the energy transition. This country has already thrown away too many opportunities.”¹³ Today, Brazil’s strategy includes investing in research, development, and technology transfer, as well as incentivizing foreign investors to add value to

critical minerals domestically. Still, implementation remains uncertain due to domestic inefficiencies and lack of strong follow-through from international partners.

Fourth, transnational crime, including in the Amazon, poses a major regional threat. While Brazil has pushed for cross-border cooperation, institutional fragmentation and bureaucratic inertia hinder meaningful results, and the issue receives limited attention in foreign policy debates. The Trump administration's militarized approach to the fight against drug cartels, however, is bound to increase Brazil's attention to this subject.

Finally, environmental protection has regained prominence under Lula. Hosting COP30 in Belém signals Brazil's renewed climate diplomacy, particularly in aligning with European sustainability agendas.

Brazil's Role in South America

Brazil's foreign policy ambitions are generally more visible at the global level, such as at the UN, while its diplomatic activities closer to home tend to be more limited. Brazil's prominent position in South America — it accounts for roughly half of the continent's population, territory, and GDP — often leads to the perception that it is naturally destined to lead the region. The reality, however, is far more nuanced. For much of the 20th century, Brazil showed limited interest in its neighboring countries, as internal challenges prevented a more active international stance. It was only in the 1980s that Brazilian policymakers began to recognize the importance of regional engagement, especially with its traditional rival Argentina.¹⁴

However, Brazil's regional leadership has often been more aspirational, with significant resistance from countries like Argentina, Venezuela, and Chile, which have historically been wary of Brazilian dominance even during periods of ideological alignment. Brazil has been hesitant to advocate for regional institutions that significantly limit national sovereignty, like the model of the European Union (EU). At times, it has been referred to as a “leader without followers” in the region due to its limited capacity to offer regional public goods to its neighbors, be it vis-à-vis financing regional infrastructure, leading efforts against organized crime, or articulating a compelling vision for the future of the region.¹⁵

This inability and unwillingness to underwrite regional integration, and its limited economic relevance in Latin America, can largely be attributed to China's increasingly dominant role. U.S. expectations that Brazil could take on greater responsibilities in Latin America — most prominently regarding Venezuela — have often led to frustration in Washington. Venezuela's recent transition to full-blown autocracy has been a reminder of Brazil's role as a backbencher compared to China, Russia, and the United States. Lula's decision in 2024 not to recognize the result of the Venezuelan presidential election, widely seen as fraudulent, was noteworthy and laudable but had no measurable impact on political dynamics in Venezuela.¹⁶

Despite significant domestic volatility and chronic economic challenges, Brazil has maintained a foreign policy tradition driven by a deep sense of status entitlement and a belief in its natural position among global powers. Historically, its foreign policy has been guided by two central principles: a commitment to multilateralism and an emphasis on strategic autonomy, which explains its reluctance to join rigid alliances that may limit its space to maneuver. Brazil has long believed that, for a large yet vulnerable country like itself, international law and global governance is crucial to guaranteeing its security and strategic autonomy — and preferable to bandwagoning with the hegemon of the day or forming alliances solely to counter the United States. Brazil's active participation in key moments of building global rules and norms — sometimes symbolic, sometimes more practical — has shaped its role on the world stage. From the Hague Conferences in the late 19th and early 20th century to the birth of the post-World War II order, the rise of the G20, and the emergence of the BRICS grouping in the 2000s, Brazil regards itself as a stakeholder in today's order rather

than an actor seeking to overthrow it.¹⁷

The turn of the 21st century brought a new phase in Brazil's international engagement, driven by economic growth, democratic consolidation, and active diplomacy under leaders like former President Fernando Henrique Cardoso and Lula. Brazil sought to project itself as a bridge between developed and developing nations, leveraging platforms like the G20 and the BRICS grouping. This can be seen as a period of peak influence, where Brazil served as a voice for the Global South and a champion of multilateralism.¹⁸

Yet persistent economic inequality, political instability, and episodes of corruption have constrained its ability to consistently project power. Brazil's reluctance to invest in hard power has further limited its capacity to enforce its leadership in contentious areas, including South America.

Brazil and Other Middle Powers

At the same time, Brazil's relationships with other middle powers, both bilaterally and through regional and multilateral groupings, reflect its strategic commitment to fostering South-South cooperation and being able to defend its interests in the multipolar global order. These relationships are central to Brazil's foreign policy under the Lula administration, which emphasizes reducing dependency on traditional Western powers and amplifying the voices of the Global South in global governance. Particularly in the late 2000s, Brazil dramatically increased its number of embassies around the world and sought to engage countries with whom it previously had only limited ties, such as Indonesia, Ethiopia, and Saudi Arabia.

Brazil's engagement with India and South Africa has been particularly robust through the IBSA Dialogue Forum, a trilateral grouping of democracies formed in 2003 that advocates for greater representation of the Global South in international institutions. However, the relevance of the grouping declined after South Africa acceded to the BRICS grouping in 2010.¹⁹

Regionally, Brazil's leadership is evident in its active participation in organizations such as Mercosur, a trade bloc that also includes Argentina, Uruguay, and Paraguay, and CELAC, a group that brings together countries from Latin America and the Caribbean. Mercosur, despite internal challenges including exemptions that limit intra-bloc trade and recurring disputes over common rules, remains a cornerstone of Brazil's economic diplomacy in South America, fostering regional trade integration. If the recently negotiated EU-Mercosur trade deal is ratified, it would mark a revival of the South American group and potentially reenergize regional cooperation. Under Lula, Brazil has also reengaged with CELAC to strengthen Latin America's collective voice on global issues.

BRICS is also central to Brazil's engagement with other middle powers. Initially driven by the desire to boost ties among member countries, BRICS has evolved into a political platform advocating for reform of global governance institutions, such as the UN Security Council and the IMF. For Brazil, BRICS is an essential vehicle for advancing a multipolar global order, providing a counterweight to Western-dominated institutions. However, internal disparities within BRICS — particularly between China, Russia, and the other members — have raised questions about its cohesion and long-term efficacy. While recent BRICS expansion helps Brazil in its quest for diversification, it has also diluted its influence in the bloc, reducing its overall usefulness.

Brazil's leadership in broader coalitions, such as the G77 and the G20, underscores its commitment to amplifying the Global South's voice in global governance. Within the G77, Brazil advocates for equitable development policies and climate justice, while its participation in the G20 allows it to engage with both developed and developing economies. In addition to formal G20 members, Brazil designated Egypt, Angola,

Nigeria, and several Latin American countries as G20 partners, which allowed them to participate in G20-related diplomatic activities during Brazil's presidency in 2024. Brazil's dual role in these forums exemplifies its ambition to navigate the complexities of North-South dynamics, aligning itself with middle powers while remaining an interlocutor for the Global South.

Analyzing three key foreign policy areas — the changing global order, managing the energy transition, and technology governance — offers insight into Brazil's global strategy and how it positions itself in the context of increasing U.S.-China competition.

Global Order, Economy, and Trade

Brazil has long been an advocate for reforming global governance structures and adapting them to a more multipolar world. Brasília's calls for expanding the UN Security Council to include permanent seats for emerging powers reflect a broader desire to modernize institutions to better reflect current geopolitical realities. Similarly, Brazil has pushed for greater representation for the Global South in institutions like the IMF and World Bank, emphasizing the need for equitable voting rights and decision-making processes. In parallel, Brazil seeks to actively expand its participation in alternative frameworks, such as BRICS.

Brazil's dual-track strategy allows it to maintain ties with both the United States and China without fully aligning with either, while also actively diversifying its relationships with third parties to increase strategic wiggle room. For example, Brazil maintains relatively close ties to the Organisation for Economic Co-operation and Development (OECD) and its 38 member countries, and has strongly supported a Mercosur-EU trade deal — a remarkable position for Lula, a president who has railed against globalization for most of his political career. At the same time, Brazil's increasing involvement in BRICS reflects its interest in diversifying its global partnerships and improving its leverage when negotiating with Washington. China's influence within BRICS, including through initiatives like the New Development Bank, offers Brazil financial and political alternatives to U.S.-dominated institutions.

Brazil's cooperation with other BRICS nations, particularly India and South Africa, helps amplify its voice in global governance discussions while counterbalancing China's dominance within the group. However, Brazil opposed the BRICS expansion initiated in 2023. In particular, Iran's accession has led to domestic debates over whether the BRICS grouping still serves Brazil's nonalignment strategy, or whether Russia and China are increasingly transforming it into an anti-Western outfit, complicating Brazil's more neutral stance.²⁰

Still, despite internal disagreements, the BRICS bloc continues to serve as a crucial platform for influencing the transition toward multipolarity. From the perspective of capitals in the Global South, multipolarity offers the most reliable mechanism to check otherwise unrestrained hegemonic power, which poses risks to international norms and stability. This fundamental consensus among BRICS nations, often underestimated by Western policymakers, has been instrumental in maintaining the cohesion and commitment of its members since the group's formation.²¹

In its quest to reform global governance, Brazil has sought allies among other middle powers, particularly in the Global South. Official rhetoric suggests that these initiatives create opportunities for Brazil to advocate for collective priorities, such as development financing and climate action, while ensuring its own interests are not sidelined. Yet in practice, cooperation between middle powers is often symbolic, since their joint influence is limited. For instance, Brazil's attempt to institutionalize IBSA faltered when China invited South Africa to join the BRICS grouping in 2010, making IBSA somewhat superfluous.

Brazil's push for reform reflects its broader desire for strategic autonomy. By advocating for a more inclusive global order, it seeks to avoid overreliance on any single power bloc, Western or non-Western. This autonomy allows Brazil to safeguard its interests, particularly in areas like trade, security, and environmental policy.

However, the current debate in Brazil largely neglects that the overall geopolitical context, shaped by intensifying U.S.-China competition and a crisis of multilateralism, may make multi-alignment more costly or more difficult to implement. After all, the U.S.-Chinese technology war and the possible emergence of competing technological spheres of influence could make remaining on good terms with everyone an increasingly challenging proposition.

Recent policy debates in Brazil have largely revolved around how to adapt to the Trump administration's disruptive foreign policy strategy. These discussions reveal a paradox: while there is concern about Washington's arbitrary and often vindictive imposition of tariffs, and alarm about Trump's rhetoric about "taking back" the Panama Canal, his promises to end the "forever wars" and avoid new conflicts have been lauded. Likewise, while Trump's pro-Russia stance and criticism of Ukrainian President Volodymyr Zelenskyy shocked many European policymakers, it paradoxically narrowed the gap between the U.S. president's worldview and that of his Brazilian counterpart, Lula.

More importantly, Trump's view on Ukraine seemed to suggest he accepted — at least in principle — Russia's quest for a "zone of influence." From Brazil's perspective, this signaled that the United States no longer viewed the world as unipolar. Yet while Brasília has long seen the end of unipolarity as a welcome development, it now fears that this may lead the great powers to divide the world into their zones of influence — and that Washington could increasingly attempt to impose its preferences on Latin America. This concern has gained renewed urgency as Trump has adopted a more aggressive strategy toward Venezuela and Colombia, including strikes on alleged drug shipments near their coasts.

Energy and Climate

Brazil's energy policy is shaped by its unique position as both a major oil producer and a top producer of renewable energy. While balancing these dual roles, the government is positioning itself as a Global South leader in the green energy transition. Brazil sees the global rise of renewable energy as an opportunity to move from a resource exporter to a country capable of adding value to its commodities — for instance, by developing processing capacity in critical minerals and clean-technology manufacturing. This positioning also forces policymakers in Brasília to limit the influence of U.S.-China geopolitical competition on energy decisions.

Brazil remains the largest oil producer in Latin America, mainly sourced from vast ultra-deep offshore oil reserves.²² However, Brazil also has the lowest share of fossil fuels in its energy mix among the world's largest economies.²³ In 2024, Brazil ranked third in renewable energy capacity, behind only China and the United States.²⁴ The country's clean energy is mainly sourced from hydropower and biofuels, in addition to recent growth in wind and solar power. In 2023, Brazil reached a significant milestone, breaking into the world's top 10 solar energy-producing nations, securing eighth place.²⁵ This growing renewable base may also help Brazil position itself as an attractive country to host data centers. As Marzia Giambertoni and Ismael Arciniegas Rueda write, Brazil has "positioned itself as an AI-ready nation powered by clean energy — with 93.6% renewable electricity generation and partnerships already forming with American companies and the Chinese government."²⁶

Brazil also has significant endowments of critical minerals. Around 20% of global rare earth reserves are located in Brazil, including the overwhelming majority of the global niobium supply. Niobium is predominantly used to strengthen steel alloys, with vital high-technology and military applications.²⁷ Brazil also has significant reserves of nickel, graphite, manganese, and copper.²⁸ This positions Brazil as a potential key partner for countries seeking to diversify rare earths supply chains and reduce their dependence on China.

Under the Lula administration, Brazil has claimed a global platform in the fight against climate change. It has carried this priority into multilateral spaces, in part by declaring climate change as a core area of focus for its 2025 BRICS presidency.²⁹ These efforts will be on display in November 2025, when global policymakers, activists, and scientists gather in Belém at COP30, the UN climate change conference. Hosting the G20 — where sustainability was a key theme — along with the BRICS summit and COP30 within a single year reflects the government's ambition to help shape the global climate agenda.³⁰

Energy independence is thus a cornerstone of Brazil's foreign policy and its pursuit of strategic autonomy. By investing in both traditional and renewable energy sectors, Brazil aims to secure its position as a reliable supplier while reducing vulnerability to external shocks. This autonomy allows it to navigate global energy markets without being overly reliant on any single power.

In this context, Brazil employs a mix of bilateral agreements (such as partnerships with China on lithium mining and with the United States on biofuels) and multilateral initiatives (such as climate negotiations within the UN framework). It also actively courts foreign investment to advance exploration of its rare earth reserves. Its participation in global energy forums further underscores its ambition to shape the transition to sustainable energy.

While balancing its dual roles in the oil and renewable markets, Brazil faces two policy challenges. The first is to avoid being trapped on the “wrong end” of the value chain as a mere commodity provider. In January 2024, Brazil launched the Nova Industria policy, designed to boost national industrial capacity. The policy prioritizes bioeconomy, decarbonization, energy transition, and security, and one target is to raise the share of biofuels in the transport sector by 50% by 2033.³¹ But according to critics, the policy may be too broad and involve insufficient funds. Furthermore, Brazil may lack the ingredients to realize its industrialization goals, including the necessary investor base, adequate infrastructure, highly qualified labor, and a supportive policy framework, particularly in the areas of critical minerals and energy transition.³²

The second challenge is for Brazil to be seen by the international community as part of the solution to global climate change efforts, rather than as a climate villain. Its commitment to decreasing greenhouse gases often conflicts with economic ambitions that drive increased oil production, creating apparent inconsistencies that have drawn criticism on the international stage. A prime example was the 2019 fire crisis in the Amazon, which led French President Emmanuel Macron to publicly single out Bolsonaro for not doing enough to combat environmental destruction.³³ While Brazil's global reputation in the realm of climate change has improved markedly since Lula's return to power in 2023 — no surprise given his predecessor's embrace of climate denialism — the country is still often framed as a global climate villain. As it prepares to host COP30, the government is aggressively seeking to shed this image.

In Brazil, the energy transition is seen not only as a unique development opportunity but also as a key battlefield as the United States and China jostle for geopolitical supremacy. The country has sought to broaden its partnership with both powers, even amid increasingly hostile overtures from Washington. While Brazil is aware of its profoundly asymmetric relationships with both superpowers — being more dependent on both than vice versa — it sees opportunities to become an indispensable player in the context of the energy transition, thus increasing its leverage. Whether or not the United States is a partner in these opportunities

looks more uncertain than ever; the Trump administration's vendetta against the Brazilian left and general contempt for clean energy will loom large for at least the next three years.

China's investments in Brazil's energy infrastructure, including solar panel manufacturing and lithium mining, solidify its role as a key partner in the country's energy transition.³⁴ During Lula's May 2025 visit to Beijing, Chinese companies announced investments totaling over \$3 billion U.S. dollars in renewable energy and sustainability projects in Brazil.³⁵ State Grid Corporation of China also announced a deal with the Brazilian government to invest \$3.6 billion in a power line for clean energy, with plans to invest 10 times that in Brazil by 2030.³⁶ Furthermore, China is the main buyer of Brazilian minerals, purchasing around \$23 billion in 2023, compared to only \$13 billion purchased by the United States.³⁷

At the same time, Brazil collaborates with the United States on biofuel technology and sustainable energy initiatives — or at least it did until the diplomatic fallout surrounding the Bolsonaro coup trial and the subsequent U.S. pressure campaign. Over the last few years, Brazil has been an important player in diversifying U.S. critical mineral supply lines in competition with China. This was seen as a real opportunity for Brazil to be an equal partner with the United States, negotiating cooperation from a position of strength. For these reasons, the two nations established the U.S.-Brazil Energy Forum, a bilateral energy cooperative framework, in 2019.³⁸ In November 2024, former President Joe Biden's administration announced an even stronger energy transition partnership with Brazil — a partnership that the U.S.-Brazil bilateral diplomatic crisis now leaves in doubt.³⁹ In July 2025, the Trump administration released a list of hundreds of exceptions to its tariffs on Brazil; rare earth metals were conspicuously absent.

Nonetheless, dual engagement with the United States and China reflects Brazil's strategy of leveraging competition between major powers to advance its domestic energy agenda. Still, this balance could easily turn against Brazil, with one or both powers attempting to coerce Brasília into cutting off the other. Not engaging in polarizing geopolitics while maximizing returns will be an increasingly challenging proposition as global tensions between the two powers continue to heighten.

Brazil further hopes that positioning itself as a leader in the Global South on green energy and climate change can bolster its case for a permanent seat on the UN Security Council.⁴⁰ Advocacy in these areas thus serves as an essential avenue to project its self-image as a leader among countries rather than merely a middle power.

Technology

The rapid evolution of technologies such as 5G mobile networks, AI, and quantum computing is poised to become a defining feature of the unfolding great-power rivalry, particularly the competition for cyberspace dominance between the United States and China. This era appears to be less about trade liberalization and open markets and more about the “geopoliticization” of the global economy, marked by a race for technological self-sufficiency. In theory, this creates an opportunity for developing countries to catch up economically and make significant productivity gains. However, it also poses a strategic threat, as countries like Brazil lack access to cutting-edge technology and may remain at a consistent disadvantage compared to those nations that lead the technology race.

This shift is already influencing political dynamics in Latin America, as evidenced in policy debates over the rise of Chinese telecommunications giant Huawei as a 5G provider in the region. U.S. policymakers pressured Latin American governments to reject Huawei, fearing that this expansion would allow Beijing to establish

unprecedented political leverage worldwide. Despite a strong ideological alignment between then-Presidents Trump and Bolsonaro, Brazil, like many of its regional counterparts, ultimately resisted Washington's pressure.⁴¹

Brazil's position as the sixth most populous country, combined with its economic vulnerability and diplomatic isolation during the Bolsonaro years, placed significant weight on its decision regarding 5G technology amid intensifying pressure from both the United States and China. In early 2020, U.S. Ambassador Todd Chapman stated that the United States was prepared to offer financial support through the International Development Finance Corporation — a development bank established in 2018 to counterbalance China's financial influence — if Brazil chose a non-Chinese 5G provider, such as Nokia or Ericsson.

Bolsonaro, often described as Brazil's most pro-American leader in history, appeared personally inclined to reject Huawei, a stance shared by key figures in his administration, including his son Eduardo Bolsonaro, Foreign Minister Ernesto Araújo, and National Security Advisor General Augusto Heleno. Bolsonaro emphasized concerns about "sovereignty, data security, and foreign policy" when addressing the matter, which many interpreted as alignment with U.S. preferences.

However, at the time, Brazil's economy was already deeply intertwined with China, its largest trading partner. Approximately a third of Brazilian exports went to China — more than double the volume sent to the United States. While Bolsonaro attempted to forge a strategic alliance with Trump during his presidency, Brazil's economic dependence on China only increased. Chinese diplomats, though largely working behind the scenes, made it clear that excluding Huawei from Brazil's 5G rollout would be interpreted as a hostile act.⁴² Huawei's cost-competitiveness and its long-standing presence in Brazil — providing equipment for 3G and 4G networks and pledging \$800 million to build an assembly plant by 2022 — made it an appealing choice.

Tensions escalated in 2020 when leading members of Bolsonaro's government made inflammatory comments about China, prompting Beijing to adopt a more assertive tone. Bolsonaro's supporters frequently stoked anti-China sentiment on social media, including conspiracy theories that COVID-19 was a Chinese plot against the West. This Sinophobia began to influence public discourse, creating divisions within the government. Key military officials and economic leaders, including Vice President Hamilton Mourão and Agriculture Minister Tereza Cristina, emphasized the importance of maintaining strong ties with China. However, they were often vilified by Bolsonaro's ideological allies as being overly sympathetic to Beijing.

Brazil's largest telecommunications companies, including Vivo, along with prominent political figures, such as then-House Speaker Rodrigo Maia, defended Huawei's participation in the 5G auction. Maia warned against politicizing the issue, arguing that delays or exclusions would harm Brazil's competitiveness, particularly in a post-pandemic world increasingly reliant on digital infrastructure. He also criticized U.S. interference, highlighting past revelations of the U.S. National Security Agency spying on former President Dilma Rousseff and Brazilian oil company Petrobras, which left many Brazilians skeptical of U.S. warnings about Chinese surveillance.

Ultimately, Brazil's decision not to ban Huawei reflected its struggle to navigate a high-stakes scenario between two superpowers. Attempting to balance these competing pressures, Brazil repeatedly postponed its decision, delaying the 5G auction initially scheduled for March 2020 until 2021. This pattern of deferral underscores the difficulty Brazil faces in preserving strategic autonomy while managing its economic and diplomatic interests with both the United States and China.

The impending technological divide is likely to accelerate and intensify the broader trend of "decoupling," referring to the declining economic interdependence between the world's two largest economies and the

deepening reluctance of Western companies to bear the geopolitical risks associated with operating in China. Such developments could lead to the formation of two distinct economic blocs, reversing the profound globalization that has characterized the global order over the past four decades. That era of globalization was largely defined by China's integration into the world economy and the growing interdependence between the world's largest and second-largest economies, which has shaped the dynamics of our time more than any other factor.⁴³

Brazil's approach to technology governance centers on maintaining strategic autonomy. It has adopted the General Data Protection Law (LGPD), modeled after the EU's General Data Protection Regulation, as part of a broader effort to set national standards on privacy and data management. This legal framework has elevated Brazil's standing in digital governance and positioned it as a reference point for other countries in the Global South.

Looking ahead, Brazil faces the challenge of scaling innovation ecosystems, addressing digital inequalities, and securing greater investment in AI, quantum computing, and cybersecurity. Participation in emerging multilateral initiatives on technology standards and AI ethics, including under the G20 and UN frameworks, offers Brazil an opportunity to shape global norms.

U.S and China Ties

While Brazilian policymakers do not necessarily endorse or embrace the idea that the country is a middle power, applying the concept to Brazil can be analytically useful, as it helps reveal comparative opportunities and risks in the current order. This is especially true vis-à-vis the debate about how Brazil should navigate an increasingly intense and turbulent U.S.-China competition and preserve its economic, diplomatic, and technological ties to both powers. For now, multi-alignment means preserving security ties with the United States while maintaining strong ties to China in key areas such as 5G technology, renewable energy, and electric cars.

U.S. Ties

Brasília's relationship with Washington presents both opportunities and constraints. The United States remains Brazil's second-largest trading partner and the largest single source of foreign direct investment. The majority of Brazil's population views the United States favorably — though views became more negative in the context of U.S. tariffs imposed in August 2025 — and readily identifies numerous similarities between the two nations: both are continent-sized countries blessed with vast natural resources and ethnically diverse populations, setting them apart from most other large countries, such as China. The United States is the most popular destination for both Brazilian migrants and tourists, and political and cultural events in the United States tend to have an impact in Brazil, be it the #MeToo movement, cases of police violence, or the rise of Donald Trump.

However, Brazilian policymakers often view U.S. foreign policy in the region with suspicion, particularly due to historical interventions in Latin America. This ambivalence is evident in Brazil's broader critique of unilateral actions, such as sanctions on Russia, which Brazil argues undermine multilateral norms. The Trump administration's decision to impose tariffs on Brazil and sanctions on Supreme Court Justice Alexandre de Moraes over the prosecution of former President Bolsonaro strengthened the perception in Brazil that the country should continue pursuing greater autonomy through diversification.

Still, numerous Brazilian leaders throughout history have attempted to forge closer ties to the United States. Brazil was designated a major non-NATO ally in 2019, and the economic relationship is highly diversified.¹⁷ When Trump returned to the White House in January 2025, Brazil largely sought to “fly below the radar” and avoid antagonizing Washington, a strategy that left Brazil ill-prepared for the sudden crisis unleashed by Trump’s surprise tariffs.

At the same time, the United States has long viewed Brazil as a potential regional stabilizer in Latin America, encouraging this role through trade, aid, and security cooperation. The Brazilian military’s reliance on U.S. equipment and training exemplifies this dynamic, underscoring a pragmatic — albeit cautious — defense relationship between the two nations.

Prior to Trump, Brazil’s interest in maintaining a stable yet independent relationship with the United States reflected its broader foreign policy principle of avoiding entanglement in the strategic priorities of great powers. Recent U.S. administrations had shown renewed interest in partnering with Brazil on issues like climate change and renewable energy — areas where Brazil seeks recognition as a global leader, through initiatives like the Amazon Fund, a mechanism created in 2008 and financed mainly by Norway and Germany to support projects that prevent deforestation and promote sustainable development in the Brazilian Amazon. However, Brazil’s reluctance to unequivocally align with Washington, particularly during contentious geopolitical crises such as Russia’s invasion of Ukraine, and China’s rise, revealed the limitations of the relationship. Furthermore, the lack of progress on more ambitious projects of bilateral cooperation (such as free trade) or addressing the region’s most complex challenges (such as the crisis in Venezuela) explain why the bilateral relationship has been described as a “long road of unmet expectations.”¹⁸

China Ties

Brazil’s foreign policy toward China has undergone a remarkable transformation over the past few decades, with Beijing emerging as a pivotal player in Brazil’s economic landscape and its largest trading partner since 2009. Brazil’s exports of soybeans, iron ore, and oil have become critical to China’s industrial growth and food security, while Chinese investments in Brazilian infrastructure, energy, and technology have further integrated the two economies. Beijing has funded projects such as port modernizations and energy partnerships, underscoring its interest in ensuring a stable flow of raw materials while providing Brazil with much-needed infrastructure upgrades.

At last year’s G20 summit in Rio de Janeiro, Brazil and China signed numerous agreements, spanning both traditional infrastructure projects and new technologies, such as AI and semiconductors.¹⁹ After years of focusing first on commodities and later on energy, Chinese investment has diversified dramatically, and the country now has a strong presence in Brazil’s technology scene. Over the past months, companies such as Meituan, TikTok Shop, and Mixue announced plans to enter the Brazilian market.²⁰

However, the commodity-driven nature of this trade has raised concerns among Brazilian policymakers about economic overdependence and being locked into low-value supply chains. Critics point to a growing trade imbalance, where Brazil primarily exports raw materials and imports higher-value manufactured goods — a dynamic that mirrors traditional North-South economic relations. There is growing concern that Brazil could be flooded with Chinese manufactured goods, especially as the West takes protectionist measures against products from China.²¹ This has already led the Brazilian government to introduce its own protectionist measures, for example, in the steel sector.

The political dimension of Brazil-China ties is equally significant. Through platforms like BRICS, Brazil and

China have found common ground in advocating for a more multipolar world and reforming global governance structures. Their collaboration on development financing, particularly through the New Development Bank, has offered Brazil an alternative to Western-dominated financial institutions. For Beijing, Brazil represents not only a key partner in Latin America but also a strategic gateway to the Global South. By fostering ties with Brasília, China strengthens its influence in multilateral forums and counters Western dominance.

Despite these areas of alignment, Brazilian leaders have voiced concerns about the implications of China's expanding presence in Latin America. While Chinese investments in Brazilian infrastructure and technology are welcomed, they also raise questions about sovereignty and dependency. The Belt and Road Initiative (BRI), China's flagship global development strategy, exemplifies this dynamic. Brazil's decision not to formally join the BRI, reaffirmed by the Lula government ahead of the G20 summit, reflects an effort to maintain strategic autonomy and signal to Beijing that it seeks a balanced partnership rather than excessive reliance on Chinese capital.²²

Domestically, the relationship with China has been subject to shifting political interpretations. During the presidencies of Lula (2003-2011) and Rousseff (2011-2016), the partnership with China was celebrated as a cornerstone of South-South cooperation. Trade and investment surged, and China became a crucial ally in Brazil's economic expansion. However, the administration of Bolsonaro initially took a more confrontational tone, aligning rhetorically with the United States and publicly criticizing Beijing — especially during the COVID-19 pandemic, when it used the term “China virus.” Yet economic pragmatism ultimately prevailed, with Brazil continuing to deepen trade ties with China despite diplomatic tensions.

For Brazil, the challenge lies in balancing the benefits of its relationship with China against the risks of overdependence. Maintaining strong ties with other global powers, such as the United States and the EU, is essential to preserving strategic autonomy. Brazil's recent diversification efforts, including increased engagement with Asian and African markets, highlight its intent to avoid being overly reliant on any single partner.

Conclusions and Recommendations

In a growing number of areas, Brazil appears increasingly aligned with China in the technology war, raising questions about the medium-term sustainability of its security cooperation with the United States. At the same time, the United States remains the single largest foreign investor in Brazil. So, while trade with China is far larger in absolute terms, policymakers in Brasília have every reason to protect trade ties to the United States, which involves a higher share of value-added goods. Decisively reducing economic ties with either power would have highly negative consequences for Brazil — a scenario the government seeks to avoid at all costs.

Similar dynamics shape the challenges of other middle powers, which are seeking to pursue foreign policy strategies that preserve ties to both major powers, while diversifying partnerships to strengthen strategic autonomy.

While the United States retains significant influence in Brazil and across South America, it has undeniably been losing ground to China, whose footprint in the region has grown dramatically over the past 25 years. To some extent, this is unavoidable: China's economy is highly complementary to South America's, while the United States and Brazil — both agricultural powerhouses — directly compete against each other, making trade liberalization unlikely. Irrespective of whether Europe ratifies the EU-Mercosur trade deal, China has

already signaled its interest in negotiating its own trade agreement with Mercosur, a proposal that Lula has publicly defended, a remarkable statement for a political leader who for decades rejected trade liberalization.

These dynamics severely limit the United States' ability to compete with China in South America and force it to focus on areas of strategic advantage, including security cooperation, combating deforestation and organized crime, as well as promoting human rights and democracy. Indeed, it is no exaggeration to say that the Biden administration's resolute defense of Brazilian democracy in 2022, when the country faced an acute authoritarian threat, was the single most consequential U.S. policy action toward Brazil since the turn of the century. U.S.-Brazil cooperation in civil society, such as through NGOs and universities, is far more important than Brazil's engagement with China in that realm. Preserving and expanding such areas where the United States has a competitive advantage is crucial.

While the United States is right to occasionally caution Brazil against excessive dependence on China, these warnings must be framed without creating the perception that the United States is more interested in combating China's influence than helping Latin America prosper economically. The case of Huawei shows that putting pressure on Brazil without offering a sensible alternative can be counterproductive and play into China's hands. Demonizing China and adopting a rhetoric that fails to recognize the positive economic impact the country's engagement has had in Brazil risks alienating Brazilian interlocutors and undermining U.S.-Brazil relations more broadly.

Instead, a constructive focus that outlines how U.S.-Brazil relations are mutually beneficial — especially in areas that are likely to increase Brazil's autonomy — is far more likely to be successful. That would involve, for example, areas where the United States can compete with China. As Ruby Scanlon and Bill Drexel write, while China clearly has the edge in shaping Brazil's digital ecosystem, “the United States retains formidable strengths — particularly in cloud computing, artificial intelligence (AI), and low Earth orbit (LEO) satellite services — that could offer Brazil alternative options for digital modernization.”⁴⁴

While the overall framing of Chinese foreign policy rhetoric toward Brazil plays to its strengths — including its “win-win” rhetoric, sensitivity to Brazil's aversion to outside interference, and geographic distance, which makes it seem less threatening — China now faces growing criticism. Many argue that trade with the Asian power fuels deindustrialization and forces Brazil into the role of a commodity provider, exposed to global price volatility and unable to move up the value chain. After two decades escaping scrutiny, there is now growing evidence of anti-China sentiment in the Brazilian public, with some citizens now wary of Chinese foreign direct investment.⁴⁵

For Brazilian policymakers, the primary challenge is to ensure the country's foreign policy strategy remains insulated from domestic ideological battles, which could undermine its long-standing foreign policy stability and predictability. The rise of Bolsonaro in 2018 marked the first time that a presidential candidate sought to gain votes by attacking China, traveling to Taiwan during the campaign, promising to sever relations with Beijing, and accusing Brazil's government of being in cahoots with the Chinese Communist Party. During his turbulent four-year term, Bolsonaro and his ministers frequently attacked China, but this did not undermine ties in a lasting way. Pressure from Brazil's agribusiness sector, a key constituency and core element of Bolsonaro's coalition, forced the president to reign in his most radically Sinophobic ministers. Yet the risk remains that future candidates could seek to gain votes by attacking the United States or China, without facing similar pushback from their core voters.

While Brazilian diplomacy has long sought to “fly below the radar” of public debate, underlining the highly complex and technical nature of geopolitics, this strategy is no longer adequate at a time when Brazilian voters regularly engage in debates about international politics. Rather, this moment calls for more active

public engagement — through seminars, op-eds, podcasts, and social media, as well as briefings for policymakers with little knowledge about international affairs — to educate both decision-makers and the broader population. This may become more difficult if U.S.-China tensions intensify and pressure mounts on Brazil to take sides. A more volatile Brazilian foreign policy that undergoes profound swings vis-à-vis U.S.-China competition is almost certainly a worse outcome than a more balanced approach.

Like other middle powers, Brazil must prepare for the possibility that U.S.-China relations will worsen, leading to a geopolitical environment where multi-alignment will be costlier and more complex. This involves developing responses for a number of scenarios, such as a U.S. threat to limit intelligence sharing to pressure Brazil into banning Chinese technology companies.

Finally, the Brazilian government should continue its diversification strategy to enhance its autonomy in the face of a less predictable global environment, broadening ties to Europe, India, and Mexico, as well as its South American neighbors or other middle powers in the Global South.

Avenues for Further Study

Two areas stand out for further study. First, while arguments about the growing global influence of middle powers are common, they are often vague and fail to point to concrete examples of how these countries can actually shape policy in the face of an increasingly fragmented global order and growing tensions between major powers.

This gap becomes particularly clear when analyzing attempts by countries such as Brazil, South Africa, and India to deepen South-South cooperation. While IBSA has largely ceased to be relevant as a platform for policy coordination, the BRICS grouping faces growing challenges to find common ground, especially after its recent expansion, which saw countries like Egypt, Ethiopia, Iran, and Indonesia join as full members. At a BRICS Foreign Ministers meeting in April, ahead of the BRICS Leaders' Summit scheduled in Rio de Janeiro in July 2025, member states failed to issue a final communiqué since Ethiopia and Egypt opposed language that recognized South Africa's ambition to play a greater role at the United Nations.

Second, there is a need for greater understanding of how middle powers such as Brazil put multi-alignment into practice. While easy to defend in theory, the return of great power politics raises a number of questions: Is multi-alignment possible in a world shaped by increasingly exclusive and incompatible technological spheres of influence? Can countries such as Brazil, for example, preserve a security partnership with the United States — one that involves extensive intelligence sharing between its armed forces — while strongly dependent on Chinese 5G technology and Chinese electric vehicles, which hold a dominant share in the Brazilian market? How can middle powers resist great power pressure to take sides? How can middle powers increase their autonomy to make such a scenario less likely? These questions may sound abstract, but they are more urgent than they seem — and, so far, policymakers and analysts in Brazil have been surprisingly reluctant to prioritize them.

Statements and views expressed in this commentary are solely those of the authors and do not imply endorsement by Harvard University, the Harvard Kennedy School, or the Belfer Center for Science and International Affairs.

Endnotes

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