“Navigating Brazil’s Changing Political Landscape”

David Fleischer
Emeritus Professor of Political Science
University of Brasília
55-61-99218-2771
e-mail: Fleischer@uol.com.br

How Brazil’s Economic & Political Realities Will Shape the Plans of the Bolsonaro Administration

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BIG “Game Changer” Election

WHAT HAPPENED?

TWO Big waves of public opinion:

1) Anti-Lula, Anti-PT

2) Alienation, disgust with corrupt political system
   “All politicians are corrupt, I won’t vote to reelect anyone, search for a new, clean face”

Bolsonaro incorporated BOTH into his campaign
   ➔ As the “anti-system” candidate
Ever since 1994, Presidential elections were polarized between the PT and PSDB

**BUT** in 2018, the PSDB & the “Center” disappeared
   ➔ Alckmin (PSDB), Marina Silva (Rede), etc.

Left-Right polarization ➔ PT *versus* Bolsonaro

Bolsonaro used digital campaign very effectively
   - Social Networks & Media
Sequence of events in 2018:

Jan. – Judge Sérgio Moro convicted Lula
April – TRF-4 maintained Lula’s conviction
7 April – Lula arrested, imprisoned in Curitiba
August – Lula stubbornly maintained candidacy
  ➔ PT officially registered Lula pres. candidacy
  ➔ Fernando Haddad as Vice
6 Sept. – Bolsonaro suffered knife attack, Juiz de Fora
  - Nearly died, saved by Juiz de Fora doctors
  ➔ No more street campaigning, no TV debates
9 Sept. – TSE rejected Lula candidacy
  ?? ➔ Where was a prisoner ever Pres. candidate??
11 Sept. – PT launched Haddad as Pres. candidate
  - Manuela D’Ávila (PCdoB) as Vice
  ➔ Haddad had less than 30 days to campaign
First ➔ Second Round Election Results

Bolsonaro (PSL)  46.05% ➔ 55.13%
Haddad (PT)      29.6% ➔ 44.87%

Valid Vote Spread +16.8 ➔ +10.2

Now the “Anti-System” Candidate will have to govern within the “System”
Election was quite “regionalized”

Haddad (PT) ➔ 11 states
  Northeast (9 states) +
  Tocantins & Pará

Bolsonaro (PSL) ➔ 16 states
  ➔ South, Southeast, Central-West &
  North (partial)
Perhaps 21 Parties in the Chamber & 15 parties in the Senate

→ Bolsonaro’s political support Coalition in Congress?

→ Should be quite broad (60% for PECs)

Bolsonaro had strong “coattails”
PSL 8 → 52 deputies + 4 senators
→ 4 Governors + many “joiners”
Considerable TURNOVER in Congress:

SENATE – 54 seats, two per state
⇒ 32 ran for reelection; only 10 reelected
  - 44 “new comers” ⇒ 81.5%

⇒ Traditional Parties reduced:
  MDB (18 ⇒ 12); PSDB (12 ⇒ 8);
  PT (9 ⇒ 6); PR (4 ⇒ 2)

⇒ Other Parties increased:
  PSD (5 ⇒ 7); Rede (1 ⇒ 5)

⇒ 12 Senators might “migrate”
Many prominent Senators defeated:

- Romero Jucá (MDB-RR)
- Eunicio Oliveira (MDB-CE)
- Roberto Requião (MDB-PR)
- Cristovam Buarque (PPS-DF)
- Magno Malta (PR-ES)
- Ricardo Ferraço (PSDB-ES)
- Lindberg Faria (PT-RJ)
- Edison Lobão (MDB-MA)
- Cássio Cunha Lima (PSDB-PB)
- Jorge Viana (PT-AC)

TWO former PSDB governors defeated for the Senate:
- Beto Richa (PR) & Marconi Perillo (GO)

⇒ Corruption accusations
CHAMBER – ALL 513 SEATS

- 52% turnover
  - Women, 53 → 75 (15%)
  - One Indian woman from Rondônia

Traditional Parties reduced:
PT (62→56), MDB (50→34), PSDB (49→29);
PP (49→37); DEM (43→29); PR (40→33)

Other Parties increased:
PSL (8→52); PDT (20→28); PRB (21→30);
PSB (26→32); PSOL (6→10); SD (10→13)
- PRB has “evangelical” deputies (IURD)

- 32 deputies might “migrate”
President-elect Jair Messias Bolsonaro begins organizing his new government

- Anti-system candidate must now operate & govern within “the system”??

Reduce cabinet ministries 29 ➔ 15 or 18
 ➔ As did Pres. Fernando Collor in 1990

Eliminate ministries & combine some into ➔ Super ministries

Reduce number federal political appointments

Organizing Congressional relations
  - Should have “strong” support coalition
 ➔ Bolosonaro to meet with 18 governors, 14 Nov.
The Bolsonaro Cabinet

Casa Civil -- Dep. Onyx Lorenzoni (DEM-RS)
Economy (Finance, Planning, MDIC & Labor) – Paulo Guedes
Defense --
Justice (Justice, CGU, Transparency, Public Security & COAF) – Judge Sérgio Moro
Infrastructure (Mines & Energy, Transportation, Urban Mobility, Sanitation & Telecommunications – Gen. Osvaldo Ferreira
Science, Technology & Higher Education
   FAB Lt. Coronel Marcos Pontes (Brazilian Astronaut)
Education, Culture & Sports --
Agriculture – Dep. Tereza Cristina (DEM-MS)
Environment –
Health –
Foreign Relations –
Institutional Security – Gen. Augusto Heleno
Social Development (Human Rights) --
National Integration (Tourism & Cities) –
Mines & Energy (might remain a separate ministry??)
Judge Sérgio, 13th Federal Circuit Judge in Curitiba

- Presided over *Lava Jato* corruption investigation
  - Convicted many politicians (PT, MDB, PTB, PP, PR, etc.)
  - Convicted Lula in January 2018

Bolsonaro ➔ “Moro has full powers to combat corruption & organized crime”

- Appointment criticized by some, especially the PT
  ➔ Moro – “That means I am doing a good job”

- Moro’s appointment being “scrutinized” by CNJ

- Moro resigned his judgeship at age 44
  - Bolsonaro might appoint him to the STF in 2020

Moro’s temporary substitute, Judge Gabriela Hardt

- She convicted/sentenced José Dirceu
Judge Sérgio Moro & President-elect Jair Bolsonaro
Foreign Affairs:

- Paulo Guedes disdained Argentina
  - “Mercosul is very low priority”

- First foreign visits ➔ Chile, US & Israel

- Bolsonaro “negative” on China
  - Buying many electric installations
  - Buying Brazilian lands
  - Bolsonaro visited Taiwan on Asia trip
    ➔ China issued “cooperation” statement

➔ Might transfer Brazilian Embassy
   Tel Aviv ➔ Jerusalem – Negative reaction by Arabs

➔ Venezuela, Cuba, Nicaragua????

➔ Ex-Foreign Minister (Lula) Celso Amorim has been
   “preaching” against Brazil and the Bolsonaro gov’t.
   in Europe and the US ➔ considered “unpatriotic”
Is Pres. Bolsonaro a “threat to Brazilian democracy??”

Because he was an Army Captain (insubordination) - was placed in the brig several times & finally absolved by STM and then resigned commission

⇒ Elected to Rio city council & 6 terms as federal deputy
⇒ Not considered part of “traditional political elite”

Because of his defense of military regime & torture while Deputy & heated campaign rhetoric, he was described as “autocratic”, “authoritarian”, pro-military intervention by the international press (linked to Brazilian left)

Bolsonaro has vowed to adhere to the 1988 Constitution & work with Brazil’s institutions – Congress, Judiciary, public prosecutors & federal police

SO – really not at all “a threat to Brazilian Democracy” - For the time being, “wait and see”
Challenges for 2019:

- Reduce (eliminate) federal fiscal deficit
  - eliminate waste & extra spending
- Fiscal deficits states ➔ RJ, RS, MG, etc.
- Social Security Reform
  - the “signal” investors are waiting for
- GDP growth ➔ new job creation
- Tax Reform – simplify tax structure
- Reduce Ministry of Labor (part of Economy Ministry)
  - Eliminate “side payments” by new labor unions
- Reduce crime & violence
- Extradite Italian terrorist/murderer Cesare Battisti