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Brazil

# Lula: from the “democratic front” to the “national unity” government

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**Lula and the PT have structured the new government by further expanding the democratic front that won the elections, incorporating parts of the traditional oligarchies of the *Centrão* [1]** After managing to move to an offensive stance on Bolsonaroism, worn down by the January putsch and by corruption scandals, they continue to seek a governability pact between the financial sector, one of the most conservative Congresses in history, and popular movements. Their objective is to restabilize the political system of “Nova República”, provide conditions for “business as usual” and produce some growth. The strategy will highlight the structural limits of the unlikely class alliance in power. The great risk is that it impasses, combined with new victories of post-fascism abroad and demobilization at home, could create the conditions for the extreme right to regain the initiative.

With the election of Arthur Lira as president of the Chamber of Deputies and Rodrigo Pacheco as president of the Senate on February 1st, 2023, both supported by Lula, the institutional political design of Lula’s third term was completed. “Without Lira and Pacheco, we would not be here today. They were largely responsible for the transition,” said Finance Minister Fernando Haddad on April 7, referring in particular to the approval of a constitutional amendment before the inauguration, which guaranteed a budget for basic measures in the first year of the administration, such as the R\$600 (US\$ 120) Family Benefit Program. He added. “This is a very fair recognition (...). I don’t think they will be lacking [now], especially with the fiscal recovery agenda, which is a state policy and not government policy”.

The elected government has been adopting the indispensable measures for rebuilding the public institutions that have been dismantled in recent years, especially in the indigenous and environmental areas, notably in the Amazon region. The Judiciary is deepening its investigation of anti-democratic acts committed by radical Bolsonaroism and is investigating a spectacular corruption scandal that strikes at the heart of Bolsonaroism – the “jewels of Arabia”. Initiatives to reconstitute smoother relations between the “democratic front” and the military are advancing; the disobedient Army Commander has been replaced and members of the Armed Forces involved in the January 8 acts will be tried as civilians. The government’s actions are beginning to gain fluidity, in some cases in the face of dramatic situations, such as the genocide of the Amazonian Yanomami people, encouraged by the previous government. There is still a feeling of great relief in the progressive spheres of society: we have gone from free fall into the abyss to a firm ground.

The harsh reality of the correlation of social forces, however, removes any illusions that we are facing a “left-wing” government. The administration moves rather slowly, conscious not only of its parliamentarian limits, imposed by the agreements with *Centrão*, but also of the contradictions within the “democratic front” between progressives and liberals. That was the case of the public friction between the PT’s president, Gleise Hoffman, and the Minister of Finance, around the new fiscal targets regime. (The new fiscal rule is already going through parliament, to replace the ultraliberal Spending Ceiling of 2016, by which Temer made it a constitutional rule that public spending and investment should only grow in direct proportion to the previous year’s inflation.)

The transmutation of the elected government from a “democratic front” into a government of “national unity”, hostage to the right and determined not to mobilize its bases, is the framework within all the disputes will take place in the coming years. Everything indicates that we have entered a period of lowered political expectations, after years of permanent stress with the neo-fascist offensive. The social left and the working people need orientations that do not tie them to the current limits – compromising the struggle for democracy, for popular demands, and for the recomposition of the left. Orientations that, on the contrary, enhance the possibility of mobilizations for systemic changes in Brazil.

# A government of “national unity”

Lula presented himself, during the campaign, as the democratic embodiment of the rejection to Bolsonaro and the defence of the institutional order, backed by his immense electoral support. Upon taking office, he constituted a “democratic front” government among progressives, leftist sectors, and liberals who supported him in the first and second rounds, within a moderate strategy of rebuilding the federal state apparatus. These forces share between them the political core and the social and environmental sectors of the federal administration.

But the government was, from the start, also formed with parts of the so called *Centrão* (literally Big Centre, the political representation of the Brazilian regional oligarchies [2] in a physiological governability pact. MDB, a federation of oligarchs from rural Brazil, Gilberto Kassab's PSD, and Luciano Bivar's *União Brasil* (a great-great-grandson of the dictatorship party, *Arena*) also joined the central government. Each of these groups was given three ministries, including some of those with the largest budgets and strategic value, such as Communications and Mines and Energy. Their ministers have extensive records of all kinds of reactionary right-wing practices, as shown by the scandals that have already erupted in Tourism (whose incumbent had militiamen from Rio de Janeiro as electoral agents) and Communications. These choices have already charged an ideological price with the politicized sectors of public opinion.

This traffic of support is far from restricted to Lula's initiatives and the federal government. The case of Gilberto Kassab (former mayor of São Paulo) is particularly relevant because he co-governs, in fact, the main state won by a Bolsonarist, São Paulo, where he is the right-hand man of Governor Tarcísio de Freitas, of Republicanos party and Bolsonaro's former Minister of Infrastructure. Freitas is a retired military man from Rio de Janeiro that had already had a prominent position in Rousseff's governments, before becoming a key figure in Bolsonaro's field. A stranger in the territory where he ran for office, he had to hand over a good part of his government to Kassab, heir to the conservative political machine of PSDB. The physiological coexistences multiply: federal deputy Antônio Carlos Rodrigues (former minister of Dilma and now in Bolsonaro's party) was elected on February 8 as the coordinator of the São Paulo caucus in the Chamber of Deputies, with the support of the PT, in a gesture to try to divide the PL base (Liberal Party, Bolsonaro's family party). Working with conservatives is the norm in the PT's political action, in what they are calling a “democratic insurance”.

The design of the current government is the culmination of the strategy that Lula had been pursuing since he left prison in November 2019, and that was already evident in 2021, when he refused to call the street mobilizations for “Fora Bolsonaro” (see the article *Quo vadis Lula?* <https://fourth.international/en/latin-america/382>). It was a dangerous strategy, which was almost wrecked in the second round of 2022 by Bolsonaro's electoral strength and manoeuvres. The support of the most globalized bourgeoisie, the Federal Supreme Court (STF) and US and European governments, and the hesitation of the Armed Forces, finally guaranteed him victory by a small margin and assured the inauguration. It was a decisive victory to recompose the perspectives of liberal democracy in the globalized world, a contest against a vast conservative constellation of illiberalisms, authoritarianisms, religious integrisms and neo-fascisms, that we see being fought from the US to the UK, from Italy to Israel, from Iran to Peru and India.

And more: Lula 3 government is becoming, strictly speaking, a Lula-Alckmin-Lira government, that is, the apportionment of the federal state machine among three sectors: 1) the reformist progressivism in all its shades (including the moderate left of the PSOL represented by Guilherme Boulos and Juliano Medeiros); 2) the “party” of big financial capital and globalized business; and 3) broad sectors of the conservative or reactionary physiological right (*Centrão*) symbolized in Arthur Lira, who negotiates, always for vested interests, with the “democratic front.” And, on the surface, Lira carries more weight than Alckmin, because the forces he represents are not as visible.

## Confronting the January 8 putsch

Lula's alliances on the right were greatly facilitated by the Bolsonarist coup attempt, an opportunity that Lula deftly seized. It forced, on one hand, a large part of the conservative and reactionary constellation - which gave Bolsonarism muscle in the dispute for hegemony - to distance itself from its fascist core and move closer to the federal government. As an exposure of the most destructive face of Bolsonarism, the coup attempt also highlighted the limits of the current international articulations of the Brazilian post-fascism. On the other hand, it made it easier for the government to provisionally resolve the serious “military question”: the unfriendliness, when not open opposition (or coups), of the high-rankling officers to Lula's government - its greatest vulnerability.

On January 21, Lula replaced the Army Commander with a General who poses as a defender of the Constitution. He also put under the media spotlight the genocide of the Yanomami people unleashed by the Bolsonaro government, walling him off from significant portions of international and national public opinion on an issue related to the defence of the Amazon - which, at the same time, unmasks the reactionary positions of the military on the subject. Lula is thus in a position to adopt harder positions in defence of the Amazon, his strategic international commitment.

As Jorge Almeida stated in an article analysing the coup attempt, this was “an opportunity for the government and the popular movements to take initiatives to clean up the far right within the institutions and to reduce its influence in society in general (...) In immediate terms, the government acted mostly correctly, within the limits of emergency measures that could be expected from a government with the purposes and alliances with right-wing liberal bourgeois sectors (including 2016 coup plotters).”

The aborted fascist insurrection of January 8 also gave conditions for the STF and the TSE (Electoral Justice) – key pieces in sustaining the government – to advance against the Bolsonaro hard core. Jair Bolsonaro has lost his immunity and, according to many analysts, will probably become ineligible; with the “Arabian jewels” scandal he may even go to prison. Figures such as former ministers Damares, Pazuello, Mourão, besides Flávio Bolsonaro (son 01), on the other hand, are senators; Eduardo Bolsonaro (son 03) and Ricardo Salles, deputies. They will count on the complicity of their “peers” to go unpunished for the next few years. This already seems to be assimilated by the “democratic front”: a PT deputy, Washington Quaquá, posted his photo on social networks posing next to Pazuello, criminal manager of Health under Bolsonaro!

## **Centrão** as obligatory partner

Lula operates pragmatically within the established institutionality, as he always said he would. His force in the House consists of 140 of the 513 deputies (including the 12 from PSOL). Bolsonaro's PL elected 99 deputies. Among the 271 “independents”, those affiliated to parties called to formally join the government, there are 143 deputies (59 from União Brasil, 42 from MDB and also 42 from PSD), more than the governing party. Still, 284 (nothing “guaranteed”) is a far cry from the 308 deputies (and 49 senators) needed to approve a constitutional amendment. In the Senate, of the 81 members (three per state), the government has 32, but including 16 from Kassab's PSD. Those who declare themselves as opposition total 27. The “independents” are 22 senators, 10 from the MDB, 9 from União Brasil, and 3 from the PSDB.

Arthur Lira was elected president of the Chamber of Deputies, with the support of both Lulism and Bolsonarism. He got 464 votes, against 21 given to Chico Alencar from the PSOL and 19 given to Marcel van Hatten, from the ultra-liberal Novo party. The PSOL's own candidacy was an important initiative for the party to affirm its independence from the new government, but it comes at a trial of strength with Guilherme Boulos, deputy for São Paulo, the new leader of the party, who presented the nomination of Henrique Vieira, from Rio de Janeiro, as deputy

leader of Lula’s government in the House. (In other words, the PSOL is part of the government’s parliamentary base).

Lira, who was an early ally of Bolsonaro, was one of the first officials to recognize Lula’s victory and negotiated with him the approval of the Transition Constitutional Amendment, which maintained the R\$ 600 (US\$ 120) payment for the Family Benefit Program. Lira rotated toward the government as a result of the attempted coup of January 8, differentiating himself strongly from the “root Bolsonarism”. He has thus gained considerable leeway to negotiate second and third level positions in the executive branch, while maintaining his autonomy to dispute conservative positions against the government in the legislature. It has already told its allies that it has “framed the government”; this means that Centrão have increased their participation in the government and in defining the conditions for governability.

As Aldo Rebelo, a former communist turned conservative who was president of the Deputies’ Chamber from 2005 to 2007, states, “in the previous [Bolsonaro] government, Arthur Lira was pointed out behind the scenes as the “Brazil Prime Minister”. In this government, he will continue to be so. This is because President Lula, with all due respect, has no votes in the Chamber. He only has the votes of the coalition that helped him get elected, the rest he will have to fight for. But, in principle, in this power struggle, the government always has the advantage. The government has the ministries, the Treasury, Bank of Brazil, Caixa Econômica, and other instruments of power. So it is always the government’s advantage. Now, this advantage exists as long as the government gets it right, and does not make serious mistakes (...) It is like people say: marriage with the government is only in health and happiness. In sickness and in sadness, forget it.” From the point of view of the Brazilian oligarchies, the current negotiations are nothing exceptional.

Senator Rodrigo Pacheco (PSD-MG), the Senate’s former president, was reelected with 49 votes against the candidacy of Rogério Marinho (PL-RN), who achieved 32 votes. It was the open confrontation between the new ruling bloc and Bolsonarism. The Senate was, together with the state governments, the body in which the extreme right was most strengthened in the 2022 electoral process. Lula’s government threw all its weight into the dispute and the result allowed us to visualize the correlation of forces of the scheme of alliances articulated by the government.

## Choices already made

In the latest round of negotiations for the second level of government, not only a new batch of politicians from União Brasil, but also from Lira’s Progressive Party, with which União Brasil will form a federation, went into government or kept their positions. PP, another of the derivatives of the old Arena, the party of the military dictatorship, has “supported” every government since its foundation in 1995. With the federation, União Brasil and PP will have the largest branch in the Chamber of Deputies, with 108 deputies, and the second largest in the Senate, with 15 senators. They will be in charge of strategic state companies such as the Company for the Development of São Francisco River Basin (Codevasf) and the National Department of Works against Droughts in the Northeast (DNOCS, this one for Avante, a PP satellite organization, with seven deputies). Lula is also negotiating with Republicanos, the party of the most reactionary neo-Pentecostal pastors (which was part of the base of the Lula 1 and 2 governments and Dilma, until they supported the impeachment). It is the party of Bishop Marcelo Crivella (former mayor of Rio) and the Universal Church, bastion of religious fundamentalism, but also of former minister Damarens Alves and former vice-president (general) Hamilton Mourão, now senators.

It was in an arm-wrestling match with Arthur Lira that Lula met his biggest defeat so far, accepting the pressure to keep in office the Minister of Communications, Juscelino Filho (União Brasil), accused of using an Air Force plane to go to São Paulo to participate in a horse auction. The PT president had asked for the removal of the minister and everything indicated that he would be fired at the meeting with Lula on March 6. On the same day, Arthur Lira, said at an event at the Commercial Association of São Paulo debating the tax reform: “We will have some time for the

government to stabilize internally, because today the government still doesn't have a consistent base either in the Chamber or in the Senate to face matters of simple majority, let alone matters of constitutional quorum.” Juscelino was not fired.

Lula's choices have already been made. He wants a quiet situation in the legislative assembly, paying whatever price is necessary for this. He is offering more money for congressional amendments than Bolsonaro (R\$46.3 billion, or \$9.2 billion) and is removing them from the calculations of the new public spending rules. [3] Lula needs to show service quickly, before the electoral honeymoon ends, in order to maintain a social majority that has proven to be electorally very narrow.

## Economy is a decisive field

Lula and PT members most dependent on popular moods (including the party's president, Gleisi Hoffman) seem primarily concerned with guaranteeing resources for redistributive policies and for what they consider development. They are aware that if it does not recover growth, employment, and income for the most vulnerable, the government will be in trouble faced with the only provisionally defeated right wing. But this “progressive” goal clashes head-on with the determination of the president and the economic team led by Haddad to demonstrate responsibility and reliability to financial capital. This is the spirit of the new fiscal rule project (or “framework”, in neoliberal economic jargon) of constitutional amendments have already been solemnly delivered to the Senate and the House, which have to approve them by a two-thirds majority. In this strategy is revealed the main contradiction nurtured by the class conciliation government.

The government's idea is to replace the unworkable Spending Ceiling invented by Temer and the ultra-liberal right wing, never completely obeyed by Temer and Bolsonaro, by a new limiting but more flexible rule. In this rule, spending and state investments can grow at a rate of 70% of federal revenues. If tax collection grows 1% during a year, from July to June, the government can increase spending by 0.7% in the following period (not including the constitutional limits for Health, Education, University Hospitals, some funds for the environment, spending limits for parliamentary amendments, and other exceptions). However, expenditures are limited to a minimum of 0.6% of revenues and a maximum of 2.6%, with the commitment to zero public deficit in 2024 and to obtain a surplus (more revenues than expenditures) in the following years. It also establishes a range (band) within which the so-called primary result - the difference between the Union's expenses and revenues - can vary. For example, for 2025, the government is committed to obtain a primary surplus of 0.5% of GDP (which today would be about R\$ 8 billion, or US\$ 1.6 billion), and the result may vary from 0.25% to 0.75% (the bands are of 0.25 percentage points less and more). If the primary result falls below the stipulated range (less than 0.25%, US\$ 800 million or less), spending can only be 50% of the total collected.

It is not necessary to be versed in economics or mathematics to understand that this is a new, more flexible Spending Ceiling. Like the previous ceiling, the new rule is based on the neoliberal idea that it is necessary to balance the accounts, with the GDP and tax collection as references, in order to guarantee a certain proportion between the public debt and the total wealth of the country measured by the GDP (the oft-repeated “GDP-debt ratio”). All this is done to guarantee that there will be enough cash flow or “savings” in advance to pay the instalments of the debt to the rentiers - those who live, in Brazil and abroad, on the income from the bonds of the country's debt.

From the economic point of view, given that the Central Bank (made independent under Bolsonaro) refuses to reduce the scorching basic interest rate of 13.75% per year, the government is left with the task of making the equation work by increasing tax collection. As it promised in its electoral campaign to lighten the tax burden on workers and the salaried middle class, for the time being the only ways left are (1) to end tax exemptions and reductions granted to domestic business sectors - which creates direct conflict with entire branches of capital; (2) to tax online gambling

(the bets). Unfortunately, it did not cross the minds of the wizards who designed the flexible ceiling to tax the present completely exempt financial operations in Brazil, especially those in which the fortunes of millionaires and billionaires are invested, and the distribution of company dividends.

There is also a third theoretically possible measure: to get a tax reform through Congress that not only simplifies tax collection, but also combats corporate “tax planning” - a euphemism for the tax evasion manoeuvres of the bourgeoisie - which would increase tax collection, together with a probable increase in taxation of the small and middle classes. The problem is that this is a gigantic challenge faced with a fragmented parliament with a right-wing majority. In the tax reform, a possible clash with the Centrão is at stake, therefore a threat to the composition agreements of the “democratic front”. The vice-president of the Republic, Geraldo Alckmin, demanded that the reform be approved this year: “We have to do the tax reform. This tax asylum in which we live is not possible. Everything ends up in court. The best profession in the world is a tax lawyer. The value of the lawsuits is a fable and everything goes to court,” said Alckmin, also Minister of Development, Industry and Commerce. The problem is that to reform the Brazilian tax system, any changes would provoke opposition.

In other words, by refusing to simply repeal Temer’s Ceiling and mobilize against spending restraints, the government is creating a huge and dangerous trap for itself. The new fiscal rule threatens the government’s own performance: the official IPEA (Institute of the Applied Economic Research) projects growth of 1.4% for 2023 and 2.6% for 2024 (for the IMF, the projections are 0.9% this year and 1.5% in 2024). Very low expectations for a country that is champion of poverty and inequality, with enormous requirements in health, education, transportation, environment, social security, and social assistance.

From a political point of view, it is a white flag towards the banking and bourgeoisie in general, which has not ceased to terrify society with its fears of “the PT’s irresponsibility”. But in yet another proof that it is not possible to please Greeks and Trojans – the Faria Lima [\[4\]](#) and the slums – at the same time, this commitment to market responsibility will limit immensely the State’s investment capacity in the economy (read: in the social area), even more so in an international conjuncture that makes good export results much more difficult than it was during the first and second Lula administrations.

## The challenge of understanding, in order to confront, Bolsonarism

Everything becomes much more difficult and challenging for Lula’s government because, despite the attrition and momentary defeat of Bolsonaro and the ultra-right, Brazil has shown itself to be divided. The deranged, coup-mongering Bolsonaro may be a (significant) minority of 20% or 25% in the polls, but he electorally drags almost half of the voting population. Bolsonaro and the ultra-right are not born out of the historical conservatism of Brazilian society. The social factory of neoliberal precarization, which was not born but grew geometrically after the 2016 coup, interacts organically with the root Bolsonarism, an expression of lumpen and low-ranking sectors of the bourgeoisie (retail trade, small/medium mining, freight carriers) that depend on plundering the labor force in a much more intense way, depredating nature, promoting the new ideologized selfentrepreneurs, and mobilizing the reactionary traditions in the culture wars against the left and social agendas. The problem is that this movement has conquered, as it has grown, more essential sectors of the Brazilian business community, such as most of the agribusiness, industry, and financial capital, with the same ultraliberal interests.

But to confront the monster, it is also necessary to understand how the left has fed it. In the space opened by Catholicism for neo-Pentecostalism and in the conciliation with the pastors promoted by the PT in its governments, the conservative offensive to make social reproduction more precarious grew. This offensive expresses itself in bigotry, misogyny, violence in general and against women in particular, homophobia, rabid transphobia, blatant

racism – another point of unity of the current reactionary constellation that challenges globalism throughout the world. The absence of political-ideological mobilization by Lulo-PTism encouraged, together with the policy set in motion in the Catholic Church by John Paul II, the mental counter-revolution that was already underway in Brazilian society: the evangelical population grew from 9% of the total in 1990, to 32% in 2020.

Neo-Pentecostalism comes along with popular entrepreneurship, individualism and competitiveness as values that spread through the social fabric, giving liberalism an organicity that it had never had until then in the country. The abandonment (by the majority left) of a political project's horizon with an equality and social justice utopia, citizenship and recognition of diversity, has provided a new type of conservatism to take root, a liability that will endure far beyond the lifetime of the present political protagonists. This is a central problem ignored by productivist and doctrinaire leftists, who treat the current wave of neo-fascisms as historical inertia or inevitability.

## The Workers' Party Legacy

The PT governments, nostalgic for the developmentalist imaginary that shaped them, and pragmatic before the agrarian elites. They were passive and conservative in the face of the three most strategic processes in the contemporary world: the enclosure of the “commons” of nature, with its entourage of environmental predation; the enclosure of the “commons” of knowledge, by the advance of digital technologies monopolized by platform corporations; and the deterioration of the geopolitical hegemony centred in the USA in growing inter-imperialist disputes.

Soy, timber, meat, oil, cellulose, sugarcane, iron ore... Each of these “economic complexes” are complexes of destruction of the country, its biome, and of the people who inhabit it and who should survive in only a subsidiary way in a rational society. They are “complexes” linked to processes of expropriation that force the miserable populations to accept them because they need to survive. This economic (and power) structure, treated by progressive economists and politicians as a given to be managed, is a threat to the survival of humanity. They also introduced the country, in the name of technological innovation seen as unavoidable, into the society of algorithmic connections, which undid all the worthy efforts of the eight years of Lula's government to formalize labor relations. And they did not understand that, in the new technological base of capitalism, international dependence was changing shape, and business with China, after 2009 Brazil's main trading partner, was further deepening the country's subordinate role in the international division of labor.

PT never understood the collapse of the Soviet Union and its “socialism,” the debacle of social democracy that became the “third way,” and the disappearance of “third worldism.” It remained frozen in the unipolar world view of the 1990s, carrying the illusion of a socialist China. It favoured, in the name of an ideology of progress, both the maintenance of the inertia of environmental predation (reduction of deforestation in the Amazon with expansion of agribusiness), and the production of a new and vast even more amorphous class of “self-entrepreneurial” proletarians, enslaved by platforms and run by neo-Pentecostal pastors.

This was the factory of Bolsonaro's post-fascism among poor people and decadent middle classes who assimilate the individualistic ideology, fall into the clutches of social media algorithms, and end up reconstituting their webs of sociability in neo-Pentecostal evangelical churches. It is very short-sighted, almost blind, to see post or neo-fascisms only as a political-ideological process, without seeing its material base, or to identify it generically with neoliberalism. This is, unfortunately, what Guilherme Boulos does, praising the Lula government for knowing how to “use, like few others, the commodities price boom, motivated by China's double-digit GDP growth, to boost Brazilian economic growth” (Sem Medo do Futuro, p.126). The social factory of fascistization of Brazil by “inclusion by the market” is still running full steam ahead and nothing indicates that it will not be answered now by the national unity government.



## Political impasses already beginning

To govern with *Centrão* to face Bolsonarism is to walk on a tightrope all the time. The government’s political articulation lives a situation of permanent saturation, since every initiative in Congress is used by some parliamentary group to try to improve its bargaining position with the government. On April 18, CNN Brasil released a video with new images from January 8, in which the chief minister of the Institutional Security Cabinet (GSI) of Lula’s government, General Gonçalves Dias, seems to be facilitating the movement of extremists inside the Planalto Palace. In it, it is possible to see GSI soldiers opening the door, giving directions on the way inside the palace, and even serving water to the invaders. GSI had placed the video under a five-year secrecy. The next day, Dias was dismissed as GSI’s head. It was the first resignation of one of Lula’s ministers. Gonçalves Dias is one of the few military men who have a relationship of trust with Lula, having been responsible for his security from 2002 to 2010. Lula believes that Dias did not betray him, but was no longer able to remain in office. In a statement to the Federal Police on the 21st, Gonçalves Dias said that the government’s lack of reaction on January 8 resulted from “a general blackout in the system due to a lack of information for decision making”.

The release of the images and the general’s resignation made the formation of a Inquiry Commission in the Congress (joint by House and Senate) inevitable. The government was trying to block the right-wing initiative on this Inquiry Commission (CPMI), whereby supporters of former president Bolsonaro wanted to accuse the Lula government of omission on January 8. But now they are already making circulate that the mentors of the acts would be infiltrated PT militants! With the CPMI, the government supporters are reacting and fighting to dominate it. If they succeed, they will seek to detail the movements of former president Jair Bolsonaro and his supporters that led to the invasion of the headquarters of the Three Branches of Power, increasing the pressure to take him to prison.

Arthur Lira also installed in the House a CPI against the Landless Workers Movement (MST). This displeased leaders of the movement, a historic ally of PT and Lula. Government congressmen are now trying to deflate this CPI or prevent it from being installed, arguing that it has no defined object. Since 2003 the MST has been investigated in four congressional commissions. But this gives Lira and the conservative press more ammunition to pressure the government for “moderation” and to “fit” it even more into conservative governance. João Paulo Rodrigues, MST national coordinator, reacted to the calls for moderation by saying that the group will always defend Lula’s government, but that it is not a “transmission belt” of the PT’s administration, nor does it accept “any kind of leash or muzzle” on the organization.

The trumpeting also involves Lula’s mistakes. He faced heavy artillery as result of his statements on the trip to China and the United Arab Emirates in which he said that both Russia and Ukraine were responsible for the war. The Brazilian president aspires to have a personal stake in a mediation in the war. But this is a minefield, involving relations not only with invaded Ukraine and invading Russia, but also with the United States and Germany, which support Ukraine, and China, Russia’s ally. Lula has in effect taken the position of China, which in February presented a 12-point peace plan that does not require Russia’s prior withdrawal from the invaded country.

The reactions of the United States and the European Union countries were strong and demanded from Lula a rectification. In a speech at Itamaraty on April 18th, Lula had to back down and affirm that the Brazilian position adopted at United Nations is one of defense of the inviolability of sovereign countries’ borders. “At the same time that my government condemns the violation of Ukraine’s territorial integrity, we defend a political and negotiated solution to the conflict,” he said. On his last trip, now to Portugal and Spain, Lula positioned himself more cautiously.

## The vicious circle in which we move

Lula and Alckmin are working with the STF to close the regime’s crisis, the chaotic interregnum opened in 2013. But they need Centrão, and they need it today much more than they needed it in 2013, because of the mistakes they made and the space they opened for reaction. In the past, Getúlio Vargas needed the agrarian oligarchies, who blocked his national-industrializing project, a crisis that escalated in 1954. Vargas won the arm wrestling at that moment, offering his own life, which gave a decade’s survival to the national-developmental state, until the coup of 1964. The Lula government is in a trap, as Jean Marc van der Weid has analyzed.

These are not mere tactical choices, but rooted in the structural dynamics of the 1988’ political system, overdetermined by world disputes between neoliberal globalism and conservative nationalism, that define whether Bolsonaro or Lula can become (again) president of Brazil. The PT’s policy of “weak reformism”, anchored on the electoral adherence of the disorganized masses turned clientele of public policies, depends, since 2006, on agreements with oligarchic sectors; it can neither formulate a project of rupture nor appeal to mass mobilization. These two are tasks for a left without the chains of “progressivism”. Conservative governance, alongside the maintenance of the developmentalist economic model, chains progressivism to the defence of a certain status quo that we can summarize as the defence of the established political regime. That leaves an avenue for the extreme right to reconstitute its political force as the (deformed) expression of social non-conformism - which will be directed by it precisely against liberal democracy. The fate of the Nova República’s regimen reveals itself to be structurally unstable in the critical conditions of neoliberal capitalism that opened in 2008.

Lula could take advantage of the current framework to change important things, like the role of the military or the regulation of platforms – and they are trying to do so – although the PT has always preferred immediate social gains over strategic policy changes, an echo of the economism that marks Brazilian progressivism. Lula has already assumed, in principle, a fundamental commitment that confronts the government not only with the extreme right but with the conservatives organized in the centre right: the defence of the Amazon, without which the external anchor of his government will disappear. His government gives space for the agendas of the different social movements to resonate again, even if they are to be sent to the mysterious corridors of the bureaucracies of the ministries or of Congress.

We should support the government in all the positive initiatives it takes, although the past history of Lula and the PT indicates that they will be limited; there is nothing to indicate that it will undertake changes that could put the core of the government - co-government with the liberals - at loggerheads with the centre right. His agenda carries an unavoidable reactionary element, the conciliation with the great agribusiness exporters, enemies of humanity, which we can observe in small “details” in the entourage that travelled in advance of Lula to China.

Once the honeymoon of the majority of the population with the government is over, social dissatisfaction will return. And not in the Brazilian society of 2010, but in that of 2022. A political turnaround in the USA, with the return of the Republicans to the government in 2026, may change the mood of significant portions of the Brazilian ruling classes. Should this occur, reactionism and neo-fascism will try to marry this with popular dissatisfaction and, thanks to unregulated digital platforms, they have the tools to do so, although no longer with the same ease as in 2018.

No one progressive likes to hear that after four years of Bolsonarism, the horizons of the hard-won Lula government are so problematic. We should contribute so that he can advance as far as possible. But the left can only do this if it advances popular demands from the movements and does not remain caught in the same trap of conservative governability that chained Lula and PT.

## Recovering the strategic horizon

We live in a time of disruptive global changes that have plunged the left into a great confusion. We cannot foresee all the consequences of the mutations, but we can visualize tendencies that mark our positions. This is what the socialists did, for example, in the 19th century regarding industrialization, and in the first decades of the 20th century regarding the perspective of wars and revolutions, as well as in the 1930s and 1940s regarding the tactics to confront classical fascism.

A first milestone, in the face of the fascisms and conservatisms that are sweeping the planet, is the task of qualifying the left with a strategic look at the struggle for political and social democracy on all fronts. It's necessary to refuse populist appeals to adapt to fleeting electoral victories, on the one hand, and, on the other, the temptation to replace the old “really existing socialism” with the Chinese or Russian model. There are no authoritarian alternatives to fascism. Democratic freedoms and rights matter, and matter a lot. They need to be anchored in processes of popular self-organization that cannot be treated instrumentally by this or that political force. To conquer governments without social ballast is not to conquer power, but to manage the established state and power.

A second milestone, in the face of a qualitatively more integrated, connected, and interdependent world, in which capital has become universalized and produces an environmental emergency, is to give centrality and new meaning to internationalism and ecologism. There is a concrete universalist heritage and a fundamental solidarity to be defended in the face of reaction, without which there is no political and social advance. It has a material, economic-environmental form. Overcoming inequality requires another economy, one that rejects the quantitative impulses of GDP growth, and promotes a fundamental redistribution of wealth and power. We need an economic proposal that is worthy of the intelligence, that breaks with the imaginative blockage established, in Brazil, by the nostalgia for developmentalism. Ecosocialism, degrowth of the rich, and economic de-globalization, accompanied by qualitatively superior regional integration, will not be driven by nationalist political forces, but in the name of all humanity and the defence of the web of life.

A third milestone is, in the face of the world of platforms, social networks, and big techs, to build anti-systemic social and political power. We see everywhere powerful processes of popular self-organization, but they do not crystallize into political tools independent of workers. A systemic alternative will be organized with a program that allows the world of work to embrace all its heterogeneity and build the social and political alliances necessary to challenge for state power. Throughout the world, women have been at the forefront of social and political change. On the other hand, the blind strategies of governmental disputes stopped accumulating social force four decades ago, destroying all the promises of the left that had reached the state apparatus. The construction of new social tools and strategies of struggle for power are inseparable.

*São Paulo, April 27, 2023*

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[1] Originating in the Constituent Assembly of 1986-1988, it designates a group of bourgeois parties that do not have a specific ideological orientation, but have as their *raison d'être* to ensure proximity to the executive power to obtain advantages and privileges, and distribute them in their electoral corrals, via clientelist networks. Most of them have their roots in political groups that collaborated with the military dictatorship. Despite its name, it is not a centre, but a grouping of politicians with a conservative orientation, generally composed of parliamentarians from the “lower clergy”, who act according to local interests, usually family ones. Most of the group was Bolsonaro's base.

## Lula: from the “democratic front” to the “national unity” government

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[2] The following parties are currently members of Centrão: Progressistas, PTB, MDB, União Brasil, Republicanos, PSD, Avante, Podemos, PSC, Patriota, Agir, Solidariedade and PROS. The Liberal Party (PL), which was once in Centrão, is now the party of much of Bolsonaro’s allies and supporters.

[3] Parliamentary amendments (to the Union Budget) are a key element in the Brazilian political system: they are the legal rights of parliamentarians to define the destination of important portions of the Union’s Annual Budget. There are individual amendments, amendments from party caucuses and amendments from committee leaders, usually to benefit their regions and supporters.

[4] Faria Lima Avenue, in São Paulo, is where the headquarters of the big companies and financial institutions are located.