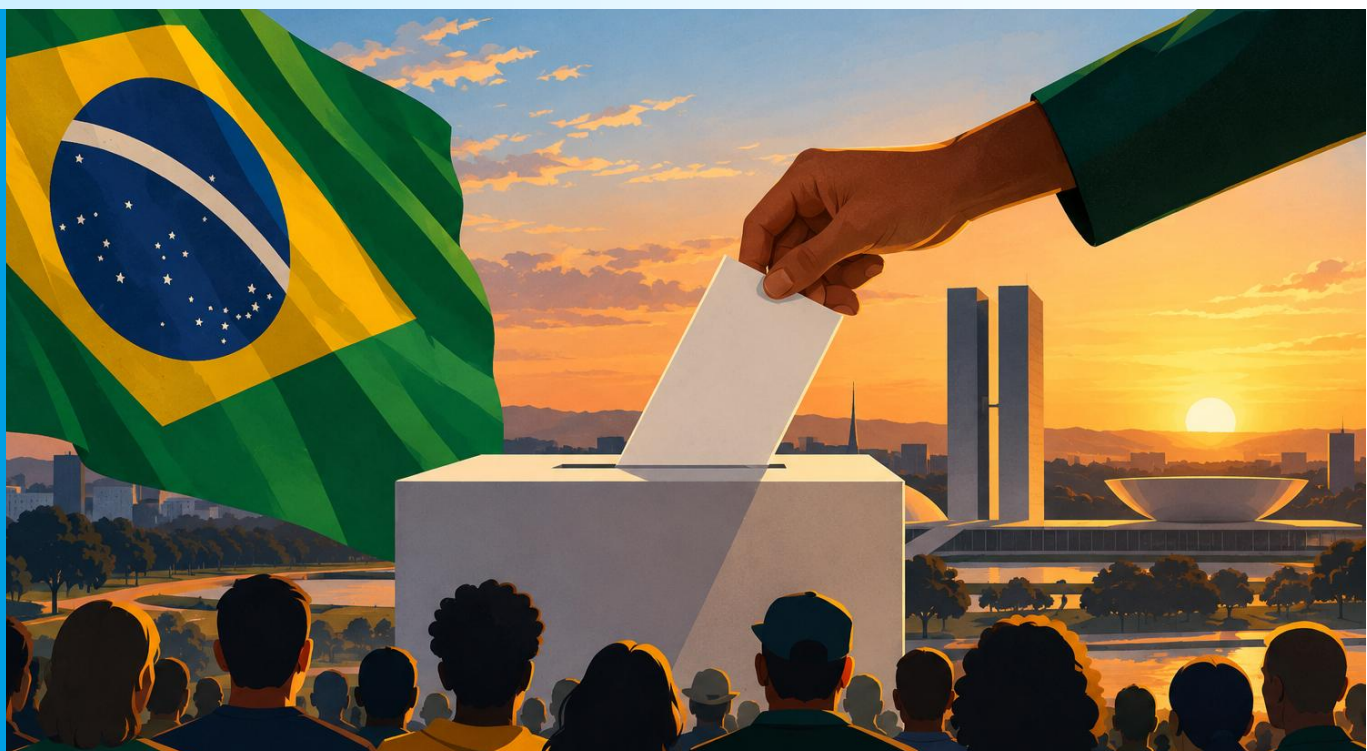




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Brazil After the Elections

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Abstract

Luiz Inácio Lula da Silva successfully defended the presidency on October 25, 2026, but his left-wing Workers' Party lacks a majority in Congress. His historic fourth term will therefore test his negotiating skills as he seeks support for social policy, security measures and public finances. Brazil will also seek to balance its relations with the United States, China and Europe.

Summary

- Lula da Silva has won another presidential term. His narrow victory confirmed the deep divisions in Brazilian society.
- Bolsonarism remains strong even after Flávio Bolsonaro's defeat, and the right has gained ground in Congress.
- Lula can build on social measures that have already been approved. New spending and reforms will depend on his ability to reach compromises; the budget and security will be key.
- Brazil will balance its relations with the US, China and the EU. The EU–Mercosur agreement is particularly important for the Czech Republic.

Election result: Lula managed to reverse an unfavorable trend

Brazil's presidential election took an unusual turn. In the first round on October 4, Flávio Bolsonaro won with 47.03 percent of the vote, while Lula received 45.16 percent. Three weeks later, however, the order was reversed. Lula received 51.79 percent of the valid votes, or 64.3 million votes, and Bolsonaro finished second with 48.21 percent. Almost 81 percent of eligible voters went to the polls, more than in the first round (Tribunal Superior Eleitoral [TSE], 2026a, 2026b).

What decided it? According to political scientist Radek Buben from the Faculty of Arts of Charles University, the mobilization of people who did not vote in the first round played a key role. Lula was able to reach out to some of the older voters, the traditional working and middle classes, but also those who, although not satisfied with his government, were still afraid of the return of Bolsonarism. He was also helped by more intensive communication on social networks, which he relied on heavily in the final stage of the campaign (Institute for Politics and Society, 2026).

The electoral map confirmed long-standing differences between parts of the country. Lula succeeded mainly in the poorer Northeast, while Bolsonaro received strong support in the South and in the Midwestern agricultural areas. Regional differences are related to income, social status, and the religious composition of the population. However, they cannot be understood simply as a battle between the poor and the rich. Brazilian society is much more complexly divided.

Immediately after the election, Flávio Bolsonaro refused to recognize the result and announced his intention to have the vote annulled. He criticized the extraordinary two-hour extension of the election day. However, the result of the vote was announced by the electoral court, and the difference between the candidates exceeded 4.4 million votes. On October 26, the Liberal Party officially recognized Lula's victory, but at the same time asked for an investigation into the alleged irregularities. Flávio Bolsonaro subsequently dropped his demand to annul the entire election, but he has not yet explicitly conceded defeat (Reuters, 2026).

Bolsonarism: a political inheritance

Flávio Bolsonaro is not just the son of a former president. He is a representative of a political movement that has managed to survive the conviction of its founder. Jair Bolsonaro, who led Brazil between 2019 and 2022, was sentenced in 2025 to 27 years and three months in prison for crimes related to the attempted coup d'état. But his political influence is far from over. For the population, Bolsonarism means an emphasis on security, conservative social values, criticism of traditional elites and opposition to the left. It relies on some businessmen, farmers, conservative voters and evangelical Christians. Religion is gaining more and more weight in Brazilian politics. According to the 2022 census, 26.9 percent of the population over the age of ten identified as members of evangelical churches, while 56.7 percent were Catholics. This means that the proportion of evangelicals has risen significantly compared with previous decades (Instituto Brasileiro de Geografia e Estatística [IBGE], 2025).

Buben points out that, in addition to traditional social divisions, two strong political identities based on rejection of the opponent have formed in Brazil. So-called *antipetismo* refers to opposition to Lula's Workers' Party (PT), which, with short breaks, has dominated Brazilian politics for much of the last two decades. On the other side are people for whom the Bolsonaro family is unacceptable. For some voters, preventing the other camp's victory is a stronger motivation than supporting their own side's political program (Institute for Politics and Society, 2026).

Bolsonarism also has a distinct family dimension. Family members are active in politics at the federal and regional levels and are gradually taking up further public offices. While political dynasties are not

uncommon in Latin America, in the Bolsonaro's case the family brand has literally become the basis of a nationwide political movement. Its strength is also reflected in the parliamentary elections: the Liberal Party (PL) won 121 of the 513 seats in the Chamber of Deputies, while the federation led by Lula's Workers' Party won 88 seats (Câmara dos Deputados, 2026).

Lula da Silva: winning elections is one thing, governing is another

Lula's political career is unparalleled in modern Brazilian history. A former union leader and co-founder of the Workers' Party, he was president from 2003 to 2010 and returned to office in 2023. His political brand is associated mainly with the fight against poverty, social programs, and raising the standard of living of low-income residents.

He also relied on these priorities in this year's elections. The government has increased the minimum monthly support in the Bolsa Família program from 600 to 691 Brazilian reais, and Congress has approved a gradual reduction of the standard working week from 44 to 40 hours. These measures have already been adopted, so Lula can build on them without pushing for a new, wide-ranging reform (Ministério do Desenvolvimento e Assistência Social, Família e Combate à Fome, 2026; Ministério do Trabalho e Emprego, 2026).

A presidential victory alone does not give Lula a majority for further legislation. Brazil's Congress has long been fragmented, and presidents have to negotiate support within it. Centrão, a loose alliance of center-right parties that can decide on parliamentary majorities, will be particularly important. The president's Workers' Party has 70 of the 513 seats in the Chamber of Deputies and does not even have a majority in the Senate. According to Buben, his position is also difficult among the governors of Brazilian states (Institute for Politics and Society, 2026).

This means that individual priorities face different prospects. The continuation of already established social programs and the implementation of decisions that the government can take within its powers have a different political complexity than new spending commitments, tax changes, or more extensive reforms. On these issues, the president will need votes from the center parties and will have to make compromises. The first test of his government's stability will be the negotiations on the budget and security policy; this is where voters' pressure for results will collide with congressional demands and limited public finances.

Lula has many years of experience in negotiating political compromises, but Brazil's system of coalition government has also been plagued by clientelism and corruption scandals in the past.

Brazil's problems: poverty, crime and unequal opportunities

Brazil is one of the largest economies in the world, yet a large part of its population struggles with poverty and insecurity. The differences between regions are huge, as is the gap between rich and poor households. The World Bank estimated that in 2025 approximately 20.3 percent of the population lived below the poverty line of \$8.30 per day (in 2021 purchasing power parity) (World Bank, 2025). Some economic indicators have improved in recent years: unemployment was around 5.4 percent in the second quarter of 2026, and inflation was 4.58 percent in the twelve months to September. However, high interest rates, which stood at 13.75 percent after the central bank's September decision, and rising public debt remain a problem. The International Monetary Fund therefore stresses the need to balance social spending, investment and fiscal stability (Banco Central do Brasil, 2026; Instituto Brasileiro de Geografia e Estatística, 2026; International Monetary Fund [IMF], 2026).

Good figures alone do not mean that people are living better. Spending on food, housing and transport takes up different shares of family budgets, and low-income households are more sensitive to rising prices. Lula will therefore have to win voters over not only with economic results but also with tangible improvements in their living conditions.

For many Brazilians, security is an even more urgent issue. According to the Atlas da Violência 2026 report, 42,590 homicides were recorded in 2024, or 20.1 per 100,000 inhabitants. Although this is the lowest figure in the period covered, crime and the activities of organized gangs remain a serious problem (Ministério do Planejamento e Orçamento, 2026). According to Radek Buben, crime was one of the most important topics of Bolsonaro's campaign. Flávio Bolsonaro called for tougher criminal penalties, expanded prison capacity and harsher action against criminal groups. Among others, he drew inspiration from Salvadoran President Nayib Bukele. Part of the public supports such proposals, as security problems directly affect their daily lives. Lula will also have to respond to this demand, even though security has not been his strong point in the past.

Another major issue is the protection of the Amazon. Brazil has a major influence on the future of the world's largest tropical forest, but at the same time it needs to develop agriculture, mining, and infrastructure. According to Brazil's National Institute for Space Research (INPE), deforestation in the Amazon fell to 3,335 square kilometers between August 2025 and July 2026, a year-on-year decrease of 41.8 percent and the lowest figure since measurements began in 1988 (Instituto Nacional de Pesquisas Espaciais [INPE], 2026). Sustaining this trend will not be easy, however. Lula must reckon with pressure from the agricultural sector, mining companies and regional politicians. The dispute over the Amazon is not just a matter of nature conservation; it is also about employment, economic development and the use of natural resources.

Brazil between the United States and China

In foreign policy, Lula has long sought to ensure that Brazil is not dependent on the decisions of any world power. He wants to maintain good trade relations with various partners and at the same time strengthen the voice of developing countries on the international stage. But in a world where the interests of the United States and China are increasingly clashing, such a strategy is becoming increasingly challenging.

Relations with Donald Trump's administration are complicated. Bolsonaro and his political camp are close to the American conservative movement, while Lula emphasizes Brazil's sovereignty and the independence of domestic institutions. Critical minerals are an important part of mutual relations. Brazil has extensive reserves of materials needed for the production of modern technologies, batteries, or equipment for the defense industry. However, the interest of foreign investors in their extraction and processing poses a problem whether the country will be able to maintain control over these resources. According to Radek Buben, the defense of national sovereignty may become one of the topics on which Lula will seek wider social support. The protection of domestic resources does not have to appeal only to left-wing voters. It can be a common interest of people with very different political positions.

From an economic point of view, China is even more important for Brazil. From January to September 2026, approximately 29.7 percent of Brazil's exports went to China, while 9.6 percent went to the United States. The Chinese market is particularly important for agricultural commodities and minerals (Ministério do Desenvolvimento, Indústria, Comércio e Serviços, 2026). This trade link means significant revenues for Brazil, but it also makes it sensitive to the development of the Chinese

economy. Lula therefore supports the expansion of trade relations and the country's active involvement in the BRICS grouping. But this does not mean a departure from the West.

Brazil's position in Latin America, where right-wing political currents have grown stronger in recent years, may also become more complicated. Lula will therefore have to seek common ground with governments whose foreign-policy priorities may differ significantly from Brazil's.

Brazil and Europe: common interests, but also trade disputes

The European Union is also one of Brazil's important economic partners. Both sides share interests in trade, energy, critical raw materials and climate policy. Moreover, cooperation with Brazil has broader significance for Europe: it allows for strengthening relations with one of the largest economies in the Global South and expanding the circle of trading partners.

A new chapter in these relations was opened by the agreement between the European Union and the South American Mercosur bloc, whose members include Brazil, Argentina, Paraguay and Uruguay. The relevant agreements were signed in January 2026, and the interim trade agreement entered into application on 1 May. However, the broader partnership agreement is still awaiting the completion of the ratification process (European Commission, 2026).

This cooperation also has controversial points. Some European farmers are concerned about cheaper South American competition and different production conditions. In September 2026, the European Union suspended imports of selected Brazilian animal products due to the lack of guarantees to control the use of antimicrobials. Brazil criticized the measures. The dispute concerned control and traceability procedures, not the proven health hazards of all affected products (Máximo, 2026).

Radek Buben draws attention to one more factor: the future of European-Brazilian relations will not depend only on politics in Brazil. Changes of government in France, Germany and other European countries, where the agreement with Mercosur provokes considerable political debates, may also be decisive. It can make it easier for Czech companies, especially manufacturers of machinery, transport equipment and industrial equipment, to access South American markets. At the same time, however, it raises questions of fair competition, differing production standards, and the protection of European agriculture. For the Czech Republic, it will be important whether it can take advantage of these business opportunities and maintain stable relations regardless of changes in Brazilian domestic politics.

Conclusion

In his next term, Lula will have different amounts of room to maneuver in different parts of his program. He can build on social measures that have already been adopted, but major new spending and reforms will require agreement with the centrist parties. The stability of the government will be tested mainly by the budget negotiations, the response to crime and the ability to prevent political competition from turning into a permanent dispute over the legitimacy of institutions. In foreign policy, Brazil will pursue trade opportunities without losing room to negotiate with the United States, China and Europe. What will be decisive, therefore, is not only the strength of the presidential mandate but the ability to translate it into concrete agreements and results.

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