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The corruption of democracy: Corruption scandals, class alliances, and political authoritarianism in Brazil[☆]

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ABSTRACT

This article examines the rise of authoritarian neoliberalism in Brazil. The study draws upon a review of the achievements and limitations of the federal administrations led by the Workers' Party (PT, 2003–2016), and the political forces pushing for the overthrow of President Dilma Rousseff. In sequence, the article examines the economic drivers and the social composition of the right-wing forces massing against the PT, and their relationship with allegation of corruption. Finally, the article outlines the political process driving the election of President Jair Bolsonaro, in order to conclude that Brazilian democracy is disintegrating rapidly and, possibly, irreversibly.

1. Introduction

Brazil has been going through an unprecedented economic and political crisis since 2013. Slowing GDP growth rates were followed by successive contractions of national output between 2014 and 2016 and by an exceptionally weak recovery. Open unemployment rose from 4% to over 14%, the nominal fiscal deficit has remained stubbornly large, and the domestic public debt (DPD) has continued to rise despite the 'austerity policies' of successive administrations, culminating in a constitutional amendment freezing government spending in real terms for 20 years (Loureiro and Saad-Filho, 2019; Phillips, 2016; Saad-Filho and Morais, 2018, chs.7–9). The political order built since the transition to democracy, in the mid-1980s, has been under unprecedented stress. Elected President Dilma Rousseff was impeached in 2016 by a 21st-century-style *coup d'état* fronted by leading figures in Congress, the Judiciary and the mainstream media.² Many prominent political leaders are implicated in a dazzling array of corruption scandals. Policy-making has become bogged in confusion, except in what concerns the imposition of increasingly radical forms of neoliberalism. Finally, Jair Bolsonaro – previously a marginal far-right Federal Deputy – was elected President in 2018; he now leads the most extremist and dysfunctional administration in Brazil's republican history.

Dilma Rousseff's ouster was preceded by vast mobilizations against

corruption, in 2013 and in 2015. They were the crucible in which was forged an authoritarian neoliberal alliance between the traditional economic and political elites and the middle class that would eventually seize control of the main levers of public policy and excluded the left in general, and the Workers' Party (PT) specifically. This article has two principal goals: first, it reviews the collapse of the federal administrations led by the PT, the rise of Jair Bolsonaro and the corruption of Brazilian democracy, as a set of specific geographical manifestations of the authoritarian turn within global neoliberalism (Boffo et al., 2018; Hendrikse, 2018). Second, it offers an original interpretation of the relationships between corruption, corruption scandals, and authoritarian neoliberalism, beyond conventional market-fetishising moralism.

This article includes eight sections. This introduction is the first. The second briefly outlines the emerging literature on authoritarian neoliberalism, explains how this article contributes to it, and provides details on the methodology of the analysis. The third reviews the achievements and limitations of the PT-led administrations of Luiz Inácio Lula da Silva (2002–07 and 2007–10) and Dilma Rousseff (2011–14 and 2014–16). This section highlights the hybrid and unstable varieties of neoliberalism implemented by the PT (see Saad-Filho, 2020), which juxtaposed neodevelopmental economic policies to the prevailing neoliberal policy framework. The fourth examines the political and

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² The term '*coup d'état*' is now generally accepted even by leading figures in Rousseff's removal, who previously insisted in the formal term 'impeachment'; see, for example, Albuquerque (2019) and Revista Fórum (2019).

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administrative shortcomings and contradictions leading to Rousseff's ouster. The fifth explains the relationship between the PT and corruption, and the party's unique vulnerability to allegations of corruption; it also reviews the role of the middle class in corruption scandals. The sixth details the shift of Brazilian public institutions towards an authoritarian variety of neoliberalism. The seventh explains the election of President Jair Bolsonaro as part of the displacement of the political centre of gravity in Brazil upwards (benefitting the better off as opposed to the poor), and to the right (across the economy, politics, and culture). This section also highlights the radicalism of the neoliberal agenda of Bolsonaro's administration, and the systemic significance underlying its apparent incoherences. The eighth section concludes this study, showing that the most remarkable peculiarity of the Brazilian path to authoritarian neoliberalism is the role played by corruption scandals in the disarticulation of the earlier political system.

2. The beast that just won't die: Neoliberalism after the Global Financial Crisis

For a brief moment in the wake of the Global Financial Crisis (GFC), and in light of the unprecedented state intervention launched to rescue large financial institutions from the damage they had unleashed upon themselves and the world, neoliberalism was declared dead. Then, again, the Brexit vote in the UK and the election of Donald Trump in the USA, in 2016, were considered signs of a retreat from globalization, and neoliberalism was proclaimed dead once more. However, after an initially enthusiastic engagement with these 'deaths' of neoliberalism despite its obvious vitality, scholars have started to pay closer attention to the protean and highly resilient nature of neoliberalism (Hendrikse, 2018). In the aftermath of the GFC, there has been a greater realisation that neoliberalism is not merely about a shift of economic policies in support of markets in general at the expense of the state but, rather, a phase or mode of existence of capitalism in which public policies promote an agenda of financialization of accumulation and the corresponding restructuring of social relations (Fine and Saad-Filho, 2017).

More recently, an emerging literature has been seeking to understand the rise of right-wing 'populist' leaders in several countries as one of the manifestations of the reproduction of neoliberalism as a system of accumulation after the GFC, this time coercively rather than through attempts to build social consent or through the co-option of marginalized groups (Bruff, 2014, 2016; Tansel, 2017; Bruff and Tansel, 2020). It is true that neoliberalism has displayed authoritarian tendencies since its inception (Chamayou, 2018; Kiely, 2018). Nonetheless, after a first 'shock' phase, spanning the period between the 1970s and the 1990s, in which the promotion of private capital proceeded in country after country without regard to the consequences, a second and more mature 'Third-wayist' phase partly attempted to address the dysfunctions and adverse social consequences of the first phase, not least by offering some form of (specifically neoliberal) welfare provision to the marginalized (Fine and Saad-Filho, 2017). Finally, the GFC prompted policy 'austerity' around the world at the expense of all forms of social provision; it also exposed a crisis of legitimacy at the core of neoliberalism itself. This third phase of neoliberalism has been marked by strongly authoritarian tendencies (Boffo et al., 2018).

This article contributes to the ongoing examination of the sources, features and dynamics and authoritarian neoliberalism in a specific geographical context through the examination of the case of Brazil, where political democracy is under threat since the removal of President Rousseff and, more evidently, after the election of Jair Bolsonaro. The article also reviews the role played by corruption scandals in demoralizing the left and creating the conditions for the hijacking of the state by right-wing forces in Brazil. In order to address these issues, the article analyzes corruption, corruption scandals and the rise of authoritarian neoliberalism through a methodology rooted in the political economy of systems of accumulation.

3. Democracy and developmentalism

Global conditions were exceptionally supportive of growth in the developing economies (DEs) in the early 2000s, because of the impact of the so-called 'great moderation' in the USA, relative prosperity in the EU, and rapid growth in China. A short-lived 'commodity supercycle' and growing inflows of foreign capital led most DEs, including Brazil, to grow more rapidly than at any time since the international debt crisis of the early 1980s (Akyüz, 2017, 2018; Laplane, 2015).

Brazil's growth surge started with the sharp devaluation of the domestic currency, the *real*, in 1999, followed by the commodity boom. The country's trade earnings increased rapidly, with export volumes rising by 64% and prices by 24% between 2001 and 2005. They explain 44% of the expansion of aggregate demand between 2003 and 2005, which pushed the rate of growth of GDP from 1.1%, in 2003, to 5.8% in 2004. In the meantime, annual foreign investment inflows rose from US \$15 billion in 2003 to US\$116 billion in 2010 (see Loureiro and Saad-Filho, 2019).

These favorable circumstances allowed the Lula administration to implement remarkably successful economic policies along what may be termed a 'path of least resistance'. This path was based on economic growth and redistribution at the margin, subject to the constraint of political stability (Loureiro and Saad-Filho, 2019; see also Calixtre and Fagnani, 2017, Souza, 2015, pp.16-19; World Bank, 2016). After years of stagnation the incomes of the bottom decile rose by 91 per cent between 2001 and 2009; in contrast, the incomes of the top decile increased by a more modest 16 per cent (Paes de Barros et al., 2012). Incomes rose by 42 per cent in the poorer Northeast against 16 per cent in the Southeast; more in the periphery than in the centre of São Paulo, and more in rural than in urban areas. Female income rose by 38 per cent against 16 per cent for men (60 per cent of the jobs created in the 2000s employed women), and the income of blacks rose 43 per cent against 20 per cent for whites (Morais and Saad-Filho, 2011; Pochmann, 2010, pp.640, 648, 2011, p.38, 2012, p.32; Tible, 2013, p.68).

Despite these significant achievements, the PT's path of least resistance precluded attempts to reform the Constitution, finance, land ownership, the media or the judicial system, as well as the mobilization of the mass base of support of the PT. In retrospect, it is clear that growth, redistribution and stability were compatible only in times of economic prosperity and, even then, they depended on unwieldy political alliances and case-by-case negotiations that relied heavily on Lula's extraordinary political acumen.

In order to secure the government's credibility with capital, finance and the mainstream media, the PT maintained the so-called macro-economic policy 'tripod' imposed by the previous (strongly neoliberal) administration, led by Fernando Henrique Cardoso, including: inflation targeting; floating exchange rates and free international capital movements; and permanently contractionary fiscal and monetary policies (Saad-Filho and Morais, 2018). They severely limited the scope for heterodox economic policies, developmental state initiatives or lasting distributional changes. The PT promoted, instead, a 'national development' strategy based on demand growth and the gradual recovery of the wage share of national income. This process was initially funded by the expansion of exports (see above) and the ensuing tax revenues; it was then fuelled by rising minimum wages and state transfers, consumer credit, the spread of low-paid urban employment, and public support for agribusiness and the extractive industries (which became the country's main source of export earnings). Government support for large capital was evident through their backing for 'national champions', that is, local conglomerates inspired by the South Korean *chaebol*, but, in Brazil, with much less ambition and scope for growth (Sallum and Kugelmas, 2004). The government also pushed strongly for large-scale infrastructure projects, regardless of their damaging environmental impact (for example, the vast Belo Monte hydroelectric dam alienated greens and large segments of the left; see Atkins, 2019),

while demonstrating repeatedly their lack of concern with small-scale peasants and land reform across the country (Agência FAPESP, 2019; Alisson, 2019).

Despite their considerable economic, social and distributional achievements, the PT administrations led by Lula and his successor, Dilma Rousseff, were limited at four key levels. First, their attachment to neoliberal economic policies was meant to secure credibility with powerful fractions of capital. However, credibility is not a material attribute that can be hoarded and deployed in measurable quantities at the desired moment; it is, rather, the unstable outcome of the operation of the institutions of the state within the bounds of neoliberalism, and their attachment to financialisation and extractivist development in particular. These policy choices were favoured by powerful social groups and the mainstream media, but they had disabling implications for growth, distribution and social inclusion, and they contributed to the PT's alienation from many of its traditional supporters on the left (Baletti, 2014; Pahnke, 2018). These constraints became evident when Rousseff attempted to relax the fiscal and monetary policy stance, in 2011: that shift rapidly ruined the government's credibility with finance, the media and domestic and foreign capital, with severely adverse implications for policymaking capacity (Saad-Filho and Morais, 2018, chs.8–9).

Second, the neoliberal macroeconomic policy mix, including high interest rates, free capital flows and currency overvaluation, would inevitably lead domestic income growth to leak abroad, through rising imports and investments overseas; at the same time, Brazil remained exposed to policy shifts in the advanced economies, for example, through waves of quantitative easing (QE) in the wake of the GFC (Kaltenbrunner and Paineira, 2018). Consequences included the long-term misalignment of the *real*, deindustrialization, especially in the manufacturing belt around São Paulo city, heavy losses of skilled jobs, and the reprimarization of the economy through the push for the expansion of agribusiness and mining in the Centre-West and North, at the expense of manufacturing industry and high-tech services based primarily in the South and Southeast (Saad-Filho and Morais, 2018, chs.4–6). In short: the PT pushed for a growth strategy based on commodity extraction as opposed to industrial transformation and upgrading, aided by redistributive policies at the margin (see below).

Third, the pursuit of neoliberal policies for two decades and the strengthening of neoliberal institutions weakened the government's capacity to implement co-ordinated industrial policies and kept a tight lid on public sector investment. These factors prevented the upgrading of economic and social infrastructure and fostered an intractable productivity gap with the OECD and China and other fast-growing Asian economies, which entrenched Brazil's subordinate position in the international division of labor (Saad-Filho and Morais, 2018, ch.4).

Fourth, income distribution at the margin through transfer programmes and the creation of low-paid jobs, avoiding the distribution of assets and economic restructuring, is limited at two levels. On the one hand, it must rely on a (frequently volatile) external driver of income growth, given the self-imposed absence of domestic engines of growth. On the other hand, the middle classes would inevitably be squeezed, given the continuing privileges of the rich (preserved in order to secure political stability and promote 'national' economic development), the rapid improvement of the poor (key beneficiaries of the PT administrations), and the deteriorating quality and rising cost of urban services (because of insufficient investment and excess demand due to the 'rise of the poor'; see below). These constraints could be relaxed temporarily by the expansion of personal credit, the appreciation of the currency, and additional imports. However, any economic slowdown, credit restriction, reversal of the terms of trade or adverse turn in capital flows would make it impossible for the PT to protect its signature policies, preserve job growth, sustain redistribution, and reconcile conflicting interests through public spending (Dweck and Teixeira, 2017; SEP-PPS, 2016).

In summary, under the PT, political stability depended on the

delivery of gains to almost everyone, which (given Brazil's low productivity growth) was possible only by riding a worldwide tide of prosperity. In those favourable circumstances, the PT could become the most successful and best-funded political party in the country, and the main representative of large domestic capital, the formal working class and the disorganized poor (Alves, 2014, pp.174–6; Boito and Saad-Filho, 2016; Martuscelli, 2015, pp.205–6). However, this alliance was unstable. Eventually, the dysfunctions of Brazil's political system corrupted the PT, while the GFC eliminated the scope for the conciliation of incompatible interests.

4. Faltering and failing

Mass demonstrations against Rousseff's government erupted in mid-2013, almost simultaneously with Turkey's Gezi Park protests. They expressed an explosive confluence of dissatisfactions within Brazilian society, and the rupture of the PT's political base of support. The protest movement emerged from the radical left, and it was closely associated with struggles for the 'right to the city' (Maricato, 2013; Rolnik, 2014); specifically, in this case, it focused on a significant increase in transport fares in São Paulo. Yet, despite these roots the movement was rapidly captured by the political right. Its explosive growth and transformation marked the emergence of a new 'alliance of elites', including those groups that had traditionally opposed the PT, especially the industrial, commercial and financial bourgeoisie, the upper middle class, and the mainstream media. In brief, the capitalists resented the escalating costs of the GFC, their loss of control over state policy and the PT's increasing detachment from neoliberalism, for example, through the deployment of increasingly bold industrial policies at the expense of financial valorization (see Singer, 2015a, pp.57, 64–6). The upper middle class was alienated from the PT because of its dislocation from the outer circles of power since Lula's election, and their losses of income and status vis-à-vis the poor. They were also firmly bound to neoliberalism by the influence of the mainstream media, which promoted right-wing ideologies and orthodox economics while, at the same time, making increasingly fantastic allegations of government mismanagement and corruption (Saad-Filho, 2013; Singer, 2015a, pp.54, 57).

In 2013, the alliance of elites already commanded a majority in Congress and the judicial system, and it influenced large sections of the youth and important segments of the working class. The most prominent channel linking these marginalized groups to the politics of the elite were the evangelical churches. They strongly opposed the expansion of civic rights under the PT, with flashpoints around the government's successful push to recognize the rights of homosexuals, and its strikingly timid attempts to liberalize Brazil's repressive abortion laws (Boito and Saad-Filho, 2016; Pochmann, 2012; Singer, 2015a). In contrast, most workers remained passive, because of the declining influence of the trade unions, the mounting pressures of the economic crisis, and the creeping demoralization of the left because of the corruption scandals involving the PT. The government became increasingly paralysed politically, and its popularity fizzled out rapidly.

Dilma Rousseff was narrowly re-elected in 2014 against the centre-right candidate, Aécio Neves. Rousseff's triumph was fragile for two reasons. First, it coincided with the rapid decline of Brazil's GDP growth rates, which had peaked at 7.5% in 2010. Growth slowed down year on year until it turned negative in 2014; the economy slid into its worst crisis in recorded history, and this was followed by a stagnation continuing to this day. The distributional improvements legitimizing the PT administrations stalled. Repeated policy failures, a relentless media onslaught, the purported entanglement of the PT in cases of corruption and the disintegration of the government's base of support triggered a severe political crisis in the country.³

³ The composition of Congress between 2002 and 2014 is examined by Dias (2014) and Nozaki (2015).

Second, Rousseff's campaign had an unprecedented left-wing flavor. Rousseff had been originally elected by a broad political alliance woven by Lula; it was led by large domestic capital, the formal working class and the disorganized poor (see above). She was re-elected by a much narrower and overtly left-wing coalition of organized workers, the unorganized poor and left parties, movements and NGOs. The PT claimed that the opposition candidate would impose harsh neoliberal policies, reduce the incomes of the poor and overturn labor rights, while Rousseff promised faster growth and higher wages, employment and benefits. The radical tone of her campaign alienated capital and the upper middle class even further; it also created badly misplaced expectations among her supporters.

Immediately after her re-election, and aware of the need to find an accommodation with finance and the neoliberal elites, Rousseff axed her developmentalist Minister of Finance, Guido Mantega, and replaced him with the orthodox banker Joaquim Levy. Her voters were left stunned (Singer, 2015b). The government incorporated the opposition discourse that the public sector was 'too big' and 'too interventionist', and that its own social programmes were 'too expensive'. All of a sudden fiscal austerity became imperative, and public spending, investment, services and transfers must be cut. Yet, this policy shift came too late, since capital had been demanding a contractionary economic strategy for the past four years. In the meantime, higher prices of petrol, electricity and other essentials, an unprecedented drought, and exchange rate volatility due to QE lifted inflation, cut demand and triggered a sharp economic contraction. Interest rates rose, and taxes fell; the fiscal deficit ballooned, regardless of the government's half-hearted attempts at fiscal restraint (see Carvalho, 2017).

The political crisis escalated. Every government initiative was blocked in Congress, and every policy proposal was rejected both by a radicalising right and by an embittered left. The media started speculating about an impending economic disaster (Singer, 2015a, p.40). Then the judiciary and the Federal Police moved firmly against the PT: a massive corruption scandal exploded, capturing the headlines and providing a focus for the opposition. Dilma Rousseff was doomed.

5. Corrupting democracy

Allegations of corruption have been part of all major political upheavals in Brazil since the 19th century, and the anti-corruption discourse against the PT closely mirrors earlier attacks against the left: historical experience shows that the Brazilian right has been able to gain mass traction only by attacking the 'corruption' of left-wing administrations. Early examples include the revolt against President Getúlio Vargas, in 1954, the Presidential election of the unhinged Jânio Quadros, in 1960, and the military coup against the left-populist João Goulart, in 1964.⁴ Yet, all military administrations were dogged by corruption scandals; for example, those around the construction company Camargo Corrêa (1974), and the cases of the *mordomias* (1976), *Capemi* (1980), *Coroa-Brastel* (1981), *Delfin* (1982), and many others (Freire, 2015; Gaspari, 2004, p.298, 2016, pp.119–22). For the left, this unfortunate sequence showed that democracy is essential for an honest political system (Boito, 2017). Yet, all post-1985 democratic governments were also implicated in corruption scandals, which were followed up in highly selectively ways by the media, the judiciary and the public. In the first presidential elections after the dictatorship, in 1989, the right managed to elect Fernando Collor, nicknamed the 'hunter of Maharajahs' (i.e., highly paid or corrupt civil servants). However, Collor was forced to resign within two years under imminent threat of impeachment because of his shocking ineptitude and repeated outrages involving thievery, sex, drugs and much more (Valença, 2002).⁵

⁴ For an overview of these episodes, see Cardoso (1978), Dreifuss (2006) and Fonseca (1997).

⁵ For additional examples, see Wikipédia (2014).

Finally, several privatizations carried out in the 1980s and 1990s were tied to large-scale corruption in terms of their prices, conditions, and eventual sale to buyers later shown to have bribed their way to success (Braga, 2015; Passos, 2014; Ribeiro, 2011).

In 2005, the mainstream media claimed that the PT had spawned a uniquely corrupt political culture, by which several Deputies were offered a monthly stipend if they agreed to vote with the government (the *mensalão* scandal). Even though this allegation was never proven, the fallout nearly triggered Lula's impeachment; several core government staff were forced to resign, and some ended up in jail (Saad-Filho and Boito, 2016). Finally, in 2013 the opposition and the media unleashed a vitriolic campaign associating the PT with corruption, which included strongly negative publicity, a battery of legal cases against party leaders and dogged attempts to throttle the PT financially, seeking to remove Rousseff, destroy Lula and disable their party (Rocha, 2017).

The most important initiative in this context was the *lava jato* operation, launched in 2014 by the Office of Public Prosecutions and the Federal Police. They claimed that a cartel of engineering and construction companies had bribed key staff of the state oil company Petrobras in order to secure their control of contracts for oil, parts, services and building services.⁶ Part of these bribes were allegedly passed on to several political parties, including the PT. The wheels of justice turned briskly, mostly by jailing chosen businesspeople and prominent politicians until they agreed a plea bargain, by which they must incriminate the PT (evidence was optional; hearsay was enough). Other individuals would then be arrested and pressed to make further allegations against the PT.⁷

This scandal was deeply rooted both in Brazil's immediate political tribulations and in the country's social and economic structure, that was increasingly anchored in primary commodity exports. The extractivist growth model promoted by the PT rested largely on the capture of natural resource rents and their use to finance public policy. This model paved the way for the concentration of income, political corruption, and economic volatility (Pahnke, 2018). At a further remove, it fed destructive outcomes at four levels.

First, *lava jato* tarnished not only the PT but also politics in general. The operation suggested that corruption and state inefficiency were the most important problems in Brazil, that all politicians are corrupt, and that the PT was especially nefarious (Campos, 2015; Nobre and Rodriguez, 2011).

Second, the anti-corruption campaign simply ignored the fact that improvements in public services are expensive, take time, require broad political agreement, and cannot be achieved without state intervention. It also bypassed real-world complications, in order to suggest that there are two possible 'solutions' to the challenge of political corruption. One is to 'roll back the state' to expand the (presumably incorruptible) private sector, transpose capitalist behaviours into the remaining public sphere, and embed the rationality of (financial) capital into state policy (cost minimization, conventional 'accountability', and so on); that is, the radicalization of neoliberalism. The other is to suggest that only a 'strong' leader can contain corruption; that is, authoritarianism. It follows that the overtly moralising goals of the anti-corruption campaign are both misleading and unachievable, and the movement is likely to feed frustration ('I tried but it was useless'), individualism ('I cannot fix the country; I must look after myself'), and abhorrence of politics ('they are all the same: pigs at the trough').⁸

⁶ Graphic summaries are available at <http://infograficos.estadao.com.br>; <http://www.estadao.com.br>; and <http://estadaodados.com>. For a description of *lava jato*, see Folha de São Paulo (2017). For a critique of the operation, see Lassance (2017).

⁷ For detailed reviews of the operation, see Damous (2017a, 2017b), Ferraz (2015), Hochuli (2017), Martuscelli (2016) and Revista Consultor Jurídico (2016).

⁸ The attack on corruption by right-wing politicians that, when in power, practice it shamelessly might seem paradoxical, but see Stanley (2018, p.26),

Third, the protests drew strength from a mainstream media that claimed the position of begetter *and* only legitimate channel of expression of the public interest. All other structures of representation were presumably ‘corrupt’, as if private newspapers and TV stations were not self-interested profit-making enterprises promoting neoliberal values, buying stories for cash and selling misleading publicity as part of their duty to shareholders. Their power was reinforced by their close relationship with key individuals in the judiciary. Stage-managed leaks from the investigations, media worship of telegenic judges and prosecutors, and daily coverage of cinematic seizures of famous politicians and businesspeople in Federal Police raids fed TV ratings and newspaper sales. In turn, constant media attention led members of the judiciary and the police to do outrageous deeds for publicity, regardless of the law. This arrangement fed a mounting fury against the political system, which was destructive for democracy (Avritzer, 2015).

Fourth, those scandals disconnected the PT from its mass base and its main sources of funding. Under the threat of indefinite detention, the ‘business community’ cut its support for the PT and accepted the radicalization of neoliberalism. The (geographically uneven) loss of millions of jobs and tens of billions of dollars in output and investment were treated as collateral damage in a war for political hegemony.⁹ In the meantime, the cacophony around corruption stifled debates about economic policy, and contributed to the rise of an aggressive form of neoliberalism centred on fiscal restraint, the curtailment of labour rights, regressive changes to taxes, pensions and social security, and the disarticulation of industrial policy. Corruption remained unabated (Saad-Filho and Boito, 2016).

Even under an unprecedentedly partisan attack, the PT continued to worship the ‘independence’ of the media, the judiciary and the Federal Police.¹⁰ In doing this, the party failed to respond to *lava jato* in the only potentially effective way: through a mass campaign against corruption including a national debate, institution-building, transparency, the reform of political finance, a law of recall of elected politicians, reforms to the country’s extractivist growth model, controls on flight capital and the relationships between private capital and the state, and the empowerment of the public to challenge various forms of dishonesty. These initiatives, backed up by self-criticism from the PT itself, could have begun to address the facts that corruption is systemic in Brazil, it must be challenged through the expansion (rather than the curtailment) of democracy, and it cannot be eliminated one criminal, firm or Swiss bank account at a time. There was an opportunity to do this during Lula’s administration and after Rousseff’s first election. When the PT finally awoke to its vulnerabilities, it was already too late and its leadership was too compromised. They were persecuted and imprisoned one by one, culminating with Lula himself: he was jailed in April 2018.

6. Moving towards authoritarian neoliberalism

The transition to neoliberalism worldwide has been associated with the extensive restructuring of production, finance, exchange and consumption, the emergence of new technologies, and the internationalization and financialization of accumulation (Fine and Saad-Filho, 2017; Harvey, 2007). These processes had profound implications

(footnote continued)

for whom ‘[c]orruption, to the fascist politician, is really about the corruption of purity rather than of law ... the fascist politician’s denunciations of corruption ... [are] intended to evoke corruption in the sense of the usurpation of traditional order’.

⁹ In mid-2016 it was estimated that the firms under investigation for corruption represented 14% of Brazilian GDP (see Scheller and Scaramuzzo, 2016). Belluzzo (2017) claims that *lava jato* and related investigations led to the loss of 5–7 million jobs.

¹⁰ The promiscuous relationship between the media, the judiciary, the Office of Public Prosecutions and the Federal Police was revealed by The Intercept (2019).

for social structures and social reproduction in several countries, including Brazil (Moody, 1997, 2017). Consequences included changes in patterns of employment, modes of labour, working class cultures and solidarities, and the decline of traditional forms of class representation, including left parties, trade unions and community and mass organizations. Their weakening facilitated the imposition of neoliberal institutions, rules, policies and practices shielding market processes in general and finance in particular from social accountability. Changes included the introduction of inflation targeting regimes, so-called ‘independent Central Banks’, maximum fiscal deficit rules, extensive privatizations, biased changes in the legal status and accountability of public bodies and regulatory agencies, and the neoliberal reconstruction of welfare policy (Dardot and Laval, 2014). Taken together, these processes fed a significant shift to the right in the political spectrum in recent decades (Boffo et al., 2018).

The technological, social, economic, institutional, ideological and political changes outlined above created a vast array of ‘losers’ under neoliberalism. These ‘losers’ tend to be politically separated and effectively disenfranchised, and they are either disinclined or unable to express their grievances through the traditional political system or other institutions of collective representation. Instead, mass frustration under neoliberalism has tended to be framed individualistically by the right-wing media, and channelled towards emerging far-right movements drawing upon a politics of resentment built upon exclusionary discourses focusing on nationalism, racial discrimination and religious sectarianism. These political and ideological changes have induced the ‘losers’ to blame ‘the other’ for the disasters inflicted by neoliberalism itself, especially the poor, immigrants, other (usually poorer) countries, minority religions, and so on. In recent times, these political projects have tended to be fronted by ‘spectacular’ leaders claiming a unique ability to ‘get things done’ by force of will (often buttressed by claims of business acumen), against presumably unresponsive elites and institutions. Their discourse has tended to foster grievances grounded upon ‘common sense’ (e.g., it is presumably ‘obvious’ that the traditional working class has been discriminated against due to state preferences for immigrants and ethnic and religious minorities, and so on). However, and to some extent paradoxically, when in power those spectacular leaders tend to impose radically neoliberal policies around taxes, employment, finance, social security, education, health, housing, and so on, with strongly adverse implications for their own base of support. At the same time, they tend to escalate dramatically the repression against the opposition, while also removing environmental regulations and opening up new areas for extractive capital, mining, deforestation and the expansion of agribusiness and all forms of foreign capital (this interpretation of authoritarian neoliberalism is developed in Boffo et al. (2018); for similar views, see Bruff, 2016, Davidson and Saull, 2017; Fressoz, 2018).

In Brazil, the rise of authoritarian neoliberalism shows two peculiar features. First, a bifurcated discourse stressing a racialized form of nationalism at home, with heavy discrimination against blacks and indigenous peoples,¹¹ in parallel with an unprecedentedly brazen subordination to the USA (in contrast, the Brazilian left invariably stresses social inclusion as well as economic nationalism). Second, while in the advanced economies the ‘losers’ are concentrated in the traditional blue collar working class, in Brazil the most prominent losers under the PT were the middle class. In summary, Brazil’s turn towards authoritarian

¹¹ While most non-whites may not necessarily see themselves as being excluded from Jair Bolsonaro’s coalition, as is shown by the President’s racially diverse voter base, authoritarian neoliberalism is not racist merely because of its rhetoric, but because its policies objectively impact upon ethnic groups differently. This is evident in the case of Brazil’s native populations, who have been suffering severe attacks and repeated indignities, but it also appears through the systematic neglect of poor urban peripheries, where blacks tend to live, in contrast with the privileging of the white upper middle class and their neighbourhoods.

neoliberalism was marked by growing social exclusion at home, the increasing influence of US policies, culture and capital, the dilution of Brazil's leadership in Latin America and among the BRICS, and a strong discursive opposition to 'corruption', 'economic incompetence' and 'left-wing populism' overtly linked to the PT. This political shift turn was propped up by an authoritarianism that seemed to have been abandoned in the early 1980s; it included police invasions of universities, trade unions and NGOs, the prohibition of art exhibitions, plays and academic events, government intervention in all manner of political activities, the militarisation of large chunks of the school system, increasing police and military violence, especially in Rio de Janeiro, the diffusion of an aggressive discourse seeking to intimidate the left and the poor, and so on.

In contrast with earlier right-wing mobilizations in Brazil, the current alliance of elites was not inspired by Catholic values and it did not appeal centrally to anti-communist discourses of Cold War vintage. Instead, it rejected 'Bolivarianism' and the (chimerical) threat of 'left-wing authoritarianism'; beyond vacuous calls for 'the end of corruption', which was code for 'the destruction of the PT', the strategic goal of the alliance of elites which eventually converged around Bolsonaro was the restriction of democracy to impose an authoritarian variety of neoliberalism. That is, it sought to reduce government autonomy from the privileged classes, reinforce the structures of exclusion, and curtail the spaces by which the majority might control any levers of public policy (Fortes, 2016; Saad-Filho and Morais, 2018, ch.9; Singer, 2015b). The shift towards authoritarian neoliberalism was prefigured by the anti-corruption campaign waged against the PT and, in this sense, the rise of Bolsonaro was not a perversion of an originally sensible and broad-based anti-corruption movement but, instead, the logical conclusion of the right-wing undercurrent exploiting the mass demand for honesty in public life in order to disable the left and overthrow an elected administration.

The middle class provided essential support for the alliance of elites. It is not difficult to understand their frustration. While large capital tended to prosper throughout the neoliberal period, the workers and the poor gained under Lula and Rousseff through higher wages, expanded welfare programmes, the creation of millions of low-wage jobs and the expansion of citizenship, including successful quotas in public universities and the civil service. In the meantime, the middle class was squeezed by the erosion of its traditional careers in the civil service, banking and middle management; for example, while the number of jobs paying more than 5 times the minimum wage increased by 950,000 in the 1990s, it fell by 4.3 million in the 2000s (Pochmann, 2012). The scarcity of 'good jobs' intensified further since 2011. The middle class was also burdened by rising minimum wages, the extension of employment rights to domestic workers (cleaners, nannies, cooks, gardeners, security guards, and so on), and the expansion of means-tested transfer programmes, which the middle class helps to fund through their taxes, but cannot claim. In sum, while both the rich and the poor prospered under the PT, the middle class lost significantly in terms of its economic prominence and social status (Pochmann, 2012; Pomar, 2013, p.42; Singer, 2015a).

Under intense economic and ideological pressure, many middle class groups tended to gravitate towards a neoliberal globalising project that might protect their traditional advantages, even if it slowed down economic growth. The middle class had already abandoned the PT and shifted their support to the Brazilian Social-Democratic Party (PSDB) and other parties of the centre-right in the mid-2000s; as time passed, this group became increasingly radicalized, and it became the mass base of the far right (Ricci, 2012; Tible, 2013). For example, former Minister Bresser-Pereira (2015) noted that 'the national-popular political pact ... evaporated. The bourgeoisie unified itself. Then came something I had never seen in Brazil. Suddenly I saw this collective hatred of the upper class, the rich, against a party and a President. It was not worry or fear. It was hatred'.

After Dilma Rousseff's ouster, the administration led by former Vice-

President Michel Temer imposed an accumulation strategy based on an authoritarian variety of neoliberalism. Political repression escalated, while the government partially broke up and denationalized Petrobras (October 2016), and introduced a constitutional amendment freezing primary fiscal spending in real terms (excluding interest payments on the domestic public debt) for 20 years (December 2016). The labor market was liberalized in rapid sequence (July 2017). The political and security roles of the Army expanded significantly. This wave of neoliberal reforms was limited only by their own unpopularity, the persistence of the economic crisis, and the divisions, incompetence and venality of Temer and his staff, who fought among themselves as they stumbled against the law, *lava jato* and other investigations of corruption.¹²

The shift towards authoritarian neoliberalism in Brazil was challenged by Lula's campaign for the presidency, in 2018. By far the most popular politician in the country, Lula romped ahead in the opinion polls, despite the strong campaign against him and the PT in the media, and his rejection by capital and the middle class. However, the plotters against Rousseff were never going to permit Lula's election: he was prosecuted, found guilty of corruption despite the lack of credible evidence (as was amply revealed by *The Intercept*, 2019), and sentenced to 12 years in prison. Lula's stand-in candidate, Fernando Haddad, achieved 45% of the votes in the second round of the elections, against Jair Bolsonaro's 55%.

Despite its immediate success, the consequences of the coup escaped the control of its leaders. The campaign against the political institutions of the state, led by the media, the political right and the judiciary under the pretext of 'fighting corruption' destroyed Rousseff, but it also damaged the credibility of politics and incinerated the traditional parties of the centre-right, that had always been enmeshed in scandal. Their shocking collapse opened the space for Bolsonaro's election. His presidency is, then, the unintended consequence of the displacement of the political centre of gravity in Brazil upwards (within the social pyramid), and to the right (across the political spectrum), and the implosion of the political centre ground. These shifts created, for the first time in half a century, a far-right movement with mass traction in Brazil, which strongly rejects environmental protections, indigenous people's rights, and any constraints against mining and agribusiness interests.

7. The consolidation of authoritarian neoliberalism

Captain Jair Bolsonaro was expelled from the Army in 1987, for plotting to bomb military and civilian facilities in order to publicize his own campaign for higher salaries for officers (see, for example, Reina, 2018; Vaz, 2018). He was elected Federal Deputy seven times, drawing upon far right and military family voters in Rio de Janeiro. His political views are based upon a *mélange* of common sense, Christianity and fascism.

Bolsonaro's presidential bid was supported by an array of small parties and neophyte politicians, and the candidate himself had only just joined the insignificant Social-Liberal Party (*Partido Social Liberal*, PSL), his eighth party in thirty years in politics, and which he would leave less than one year into his administration. His campaign was organized around four themes. First, corruption, the traditional way for the Brazilian right to gain mass support (see above), drawing upon his purported status as an 'outsider' to a rotten political system (even though Bolsonaro had been in Congress for 28 years). Second, conservative moral values and the rollback of citizenship. The candidate attacked social movements and the left because they are 'corrupt',

¹² See Carvalho (2017), Proner et al (2016) and Rossi and Mello (2017). The implications of the 'reforms' for the working class are examined by Marcelino (2017). The fiscal policies of the Temer administration are reviewed by Dweck and Teixeira (2017) and SEP-PPS (2016). The reform of social security is discussed by Fagnani (2017).

‘communist’ and ‘godless’, and advocated the restoration of ‘lost’ values by deathly violence, for example, against wayward women (who bring rapists upon themselves), the LGBTQ + community (whose rejection of traditional modes of living implies the forfeiture of their human rights), and sex education (because it promotes abortion and ‘deviant behaviours’). Third, public security and easier access to weapons, which has intuitive appeal in a country with a history of violence, entranced by US values, enduring over 60,000 murders per year (of which 5000 perpetrated by security forces), and where daily crimes are the main topic of scandalous newsheets and several TV programmes. Fourth, a neo-liberal economic programme, drawing upon the appealing notions of reducing bureaucracy and the deadweight of a corrupt state and, simultaneously, loosening the restrictions on ‘economic progress’ (i.e. extractivism) through a sustained attack against indigenous rights (see Atkins, 2018; Cohen, 2019).

Yet, Bolsonaro’s election owed less to his own merits and the (limited) appeal of his programme than to fortuitous events: the imprisonment of Lula, a failed attempt on Bolsonaro’s life, which allowed him to avoid debates with his competitors, the paucity of viable candidates on the centre-right, and so on. Partly for these reasons, when in government Bolsonaro could not rely on the firm support of any constituency. For example, he could not count on capital as a whole, because even though most businesspeople supported him, they did so only after the other options on the centre-right foundered. The middle class attached itself to Bolsonaro as the bearer of right-wing values, but their passions are fluid, as was shown by their transient affections for Fernando Collor, Fernando Henrique Cardoso and Lula. The workers and the poor remain divided, disorganized and intimidated. Bolsonaro’s most reliable supporters are a constellation of right-wing evangelical sects espousing a ‘theology of prosperity’. Beyond these political complexities stands the Army, seeking to resume its traditional role of arbiter of the national interest.

Tensions between these groups morphed into disputes for positions in the administration. Predictably, Bolsonaro was unable to fulfil his promise to cut the number of Ministries from 29 to 15, eventually settling at 22: he had finally realized that the Brazilian political system operates through the distribution of posts controlling substantial budgets, in order to pacify conflicts of interest, keep the state governors on board and secure votes in Congress (Nobre, 2013, 2016). Coalition-building was further complicated by the allocation of several high-level positions to different factions within the Army, which reduced the spaces to accommodate career politicians. The role of the Armed Forces was further confused by disputes between Bolsonaro and Vice-President General Hamilton Mourão, as the latter sought to contain some of the President’s wildest ideas, among them the invasion of Venezuela on behalf of the USA in order to overthrow Nicolás Maduro.¹³

In this heated context, it became impossible to secure competent appointments to sensitive posts, with particularly egregious outcomes in the Ministries of Education, Foreign Affairs, and the Environment. The latter had especially dramatic implications, as the bumbling Minister hastily legalized dangerous pesticides, supported attacks on indigenous rights and promoted the deforestation of the Amazon, leading to a record number of forest fires in 2019.¹⁴ Criticisms from civil society and foreign governments met a furious response, as Bolsonaro sought to protect his base of support among medium-sized agrarian capital operating at the frontier, even at the expense of the interests of large agribusiness, that was concerned that the growing damage to Brazil’s image could reduce their access to external markets.¹⁵ Bolsonaro’s environmental policies are, then, ecologically

destructive and systematically disrespectful of human rights, particularly of indigenous peoples (Meeus, 2019). This marks a sharp difference between Bolsonaro’s policies and Lula and Rousseff’s, which, while also destructive, were not part of a climate-change-denialist international right-wing initiative to slash and burn their way to political hegemony (Aykut and Dahan, 2015; Castro, 2014; Viola and Franchini, 2018).

Those frictions were intensified by the corrosive influence of Bolsonaro’s three sons, all politicians, who specialize in responding crudely to any attack against their father (see, for example, Benites, 2019). Bolsonaro’s opinion poll ratings started to decline relatively early, due to childish administrative mishaps, gross political mistakes, mounting allegations of corruption and gun trafficking, increasing evidence of family involvement in paramilitary militias (including the murder of Rio de Janeiro council member Marielle Franco), and unpopular industrial, regional and environmental policies. Very soon, the administration became enmeshed in a quagmire of bluster, rumour, threats to disband the Supreme Court and attacks against the poor, women and minorities, played out in tweets of unparalleled crassness. Especially bizarre was the role of Olavo de Carvalho, a vitriolically reactionary journalist, astrologer and online philosophy teacher based in the USA, who has promoted the appointment of several high-ranking individuals in the administration while, simultaneously, spreading offence and discord on twitter and Youtube (see, for example, Brasil 247, 2019b). Although the mayhem in Bolsonaro’s camp should be good news for the left, the opposition remains paralysed by repression, lethargy and unemployment, and deadlocked by disputes around the achievements and limitations of the PT governments and the best strategy to confront the far right.

While the political side of Bolsonaro’s administration wallows in confusion, the economic side has been dominated by Finance Minister Paulo Guedes. He was a minor ‘Chicago Boy’ in General Pinochet’s Chile (Schipani and Leahy, 2018), and, later, a banker and occasional academic in Brazil. Guedes rose to prominence after a daring bet: he associated himself early on with one of the most implausible presidential candidates. Jair Bolsonaro readily admitted that he knew nothing about economics, but he knew that Guedes could connect him to capital and finance, which would bring credibility, campaign funds and ideological glue to firm up Bolsonaro’s disparate base of support.¹⁶

Guedes focused on two key prizes for capital: the neutralization of the trade unions, and the reform of federal pensions. Symbolically, on 1 March 2019 Bolsonaro signed Provisional Measure (MP) 873 (MPs are, effectively, Presidential decrees valid for 120 days), prohibiting employers from collecting trade union dues through payslips. Trade unions must, then, post bills to each member’s home, who have to pay them at a bank every month (direct debits are not allowed). This MP is likely unconstitutional, because it is vexatious and challenges existing agreements between trade unions, employers and employees. However, until it fails either in Congress or the Supreme Court, many trade unions will have gone bankrupt.

Next was the abolition of Brazil’s state-guaranteed defined benefit pensions, which had been pursued by the political right since it was included in the democratic Constitution of 1988. The scheme expanded under Lula and Rousseff, with remarkable outcomes in terms of income distribution and empowerment of the poor. Michel Temer’s failure to reform pensions enraged capital, finance and the media; in response, many moguls bet on Bolsonaro, expecting him to push through the reform.

Guedes proposed a pension system based on individual accounts, minimal redistribution between generations or classes, and tough limitations on drawing income. His proposal was so restrictive that most low earners with unstable jobs would never achieve the contributions threshold to claim benefits, while the rich would tend to choose private

¹³ See, for example, Clarín (2019).

¹⁴ See, for example, Azevedo and Prazeres (2019), Brasil 247 (2019a) and Valente (2019).

¹⁵ See, for example, Democracy Now! (2019) and Warth and Fernandes (2019).

¹⁶ See Gaspar (2018) and Leitão (2018).

pensions with more flexible conditions and uncapped returns. The public pensions system would inevitably collapse (for an overview of the debates, see [Narcizo, 2019](#)). The reform of pensions went to Congress in March 2019, where it has made slow but steady progress. In the meantime, Minister Guedes has outlined his next goals: the privatization ‘of everything’, severe cuts to pay and conditions and employment in the civil service, and a tax reform creating a less progressive system.

8. Conclusion

Four lessons can be drawn from the authoritarian turn in Brazil. First, Brazilian politics has been defined by a convergence of dissatisfactions since 2013. Disparate demands and conflicting expectations have been buttressed by an alliance of elites supporting a radically neoliberal economic, social and political programme that can be enforced only by authoritarian means. The regressive implications of this programme were veiled by a hegemonic discourse stressing the need for an alternative to the ‘incompetence’, ‘corruption’ and ‘populism’ of the PT.

Second, the cycles of the Brazilian right (peaking, most recently, in the mid-1930s, between the mid-1950s and the mid-1960s, in 1990–92, and since 2013), suggest that the powerful rise up if their wealth is threatened, or if economic privilege fails to secure political prominence. However, wider support for the elite always depends on the engagement of the middle class.

Third, the far right has achieved ideological hegemony and a solid electoral majority, despite the lack of stable leadership, strong movements and solid parties. From this angle, the Brazilian case contrasts sharply with other authoritarian neoliberal experiences, where a politics of resentment has been deployed in a more organized manner to buttress a radical neoliberal programme; e.g., in Hungary, India, Italy, Poland, Russia, Turkey or the USA.

Fourth, the left remains paralyzed by disputes about the past, and by the lack of a feasible vision of the future. The absence of alternatives and the rightward shift in the country’s political centre of gravity, especially in the wealthiest regions and the largest cities, suggest that the left may be unable to govern Brazil until it reinvents itself, which can be achieved only in the long-term.

The worst economic crisis in Brazil’s recorded history and the most severe political impasse in the last century have degraded Brazilian democracy, and made it impossible for any plausible composition of forces to govern the country within the democratic Constitution. The nation is tearing itself apart. Neoliberal economic policies are both ineffective and unpopular ([Barrocal, 2019](#); [Fernandes, 2019](#)). Most political parties are implicated in a never-ending array of scandals. The media, the judiciary, the police, Congress and the Executive fight openly. The Executive was seized by a gang linked to organized crime. Their rule can be secured only by authoritarian means, implying that the emerging political disputes will tend to be resolved outside the Constitution. Whether or not Brazil sinks into an overt politics of violence drawing upon drugs, guns and state terrorism, as in Colombia or Mexico, or if democracy is dislodged by a military coup, this would mark the inglorious end of a democratic experiment that has marked two generations, and that achieved significant successes. A new set of democratic forces and institutions is urgently needed, in order to confront the forces of obscurantism that have seized that country.

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