

Brazilian Development at a Standstill? Perspectives and Challenges for the New Lula Government.

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IN SHORT

EN

- Brazil has a standstill development syndrome as its development path swayed from extractivism to industrialization and back to extractivism.
- The prioritization of environmental protection and indigenous rights is the most significant novelty for Lula in 2022 compared to his previous governments.
- Lula's third mandate will not be a left-wing government due to the broadness of the coalition.
- Lula aims to improve people's livelihoods and reduce poverty by promoting industrialization. Therefore, international actors should support and enable access to technology and know-how – mainly focusing on green transition.

DE

- Brasilien leidet unter entwicklungsstillstand. Es schwankt zwischen Extraktivismus und Industrialisierung, gleitet seit geraumer Zeit aber wieder in Extraktivismus ab.
- Die neue Regierung Lula priorisiert Umweltpolitik. Dies ist eine wichtige Neuerung im Vergleich zu vorherigen Regierungen. • Lulas Regierung ist auf eine breite Koalition angewiesen um Veränderungen durchsetzen zu Können. Sie wird daher pragmatische Lösungen abstreben.
- Lulas Politik zielt darauf ab, die Lebensbedingungen breiter Bevölkerungsschichten zu verbessern. Internationale Akteure sollten daher den auch Brasiliens Zugang zu Technologie ermöglichen - vor allem mit Blick auf Energiewende und sozio-ökologische Transformation.

FR

- Le Brésil souffre d'un syndrome de développement arrêté, car sa trajectoire de développement est passée de l'extractivisme à l'industrialisation, puis à nouveau à l'extractivisme.
- La priorité donnée à la protection de l'environnement est la nouveauté la plus significative pour Lula en 2022 par rapport à ses précédents gouvernements.
- Le troisième mandat de Lula ne sera pas un gouvernement de gauche. Il dépend plutôt d'une ample coalition et privilégiera des solutions pragmatiques.
- La politique de Lula cherche à améliorer les conditions de vie de larges segments de la population. Les acteurs internationaux devraient donc permettre au Brésil d'accéder à la technologie, notamment dans la perspective de la transition énergétique et socio-environnementale.

ES

- Brasil tiene un síndrome de desarrollo interrumpido, ya que su trayectoria de desarrollo oscila entre el extractivismo, la industrialización y la vuelta al extractivismo.
- La priorización de la protección del medio ambiente es la novedad más significativa de Lula en 2022 en comparación con sus gobiernos anteriores.
- El tercer mandato de Lula no será un gobierno de izquierdas debido a la amplitud de su coalición.
- Lula se propone mejorar las condiciones socioeconómicas de la población promoviendo la industrialización. Así pues, los actores internacionales deben facilitar el acceso tecnológico y a los conocimientos especializados, centrándose principalmente en la transición verde.

Introduction

In October 2022, Brazil elected ex-president Luiz Inácio Lula da Silva (PT, Workers Party) with 50.83 percent of the votes against 49.17 percent to President Jair Messias Bolsonaro (PL, Liberal Party). Lula vowed to bring Brazil back to what it was in the 2000s: a developmentalist, left-leaning emerging power and a multilateralism champion. However, the country Lula will receive on 1st January 2023 is not the same as his first two mandates. The international conjuncture is much more restrictive, there is no commodities boom, and domestic politics are highly conflictive. Moreover, Lula will not be able to pursue the developmentalist, neoextractivist model he once did, as he promised an alternative to predatory development and growth through a green transition. This way, Brazil will be at a crossroads, searching for ways to combine a new political configuration while tackling yet another turn on its development path.

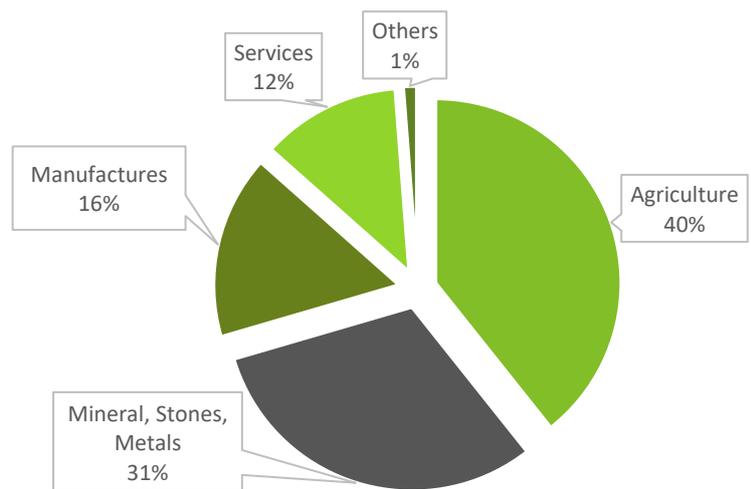
Brazil has been a central topic for Development Studies, International Relations, and Geopolitics alike, as it is the fifth-largest country in the world (8.358.140 km²), with the sixth-largest population (213.9 million) and the twelfth economy (US\$ 1.608.981.22 million).¹ This way, it has often been framed as an emerging developing country that can transform into a developed one. The "Brazilian potential" has been linked with its vast and fertile lands, abundant sources of mining resources, its oil reserves (most recently, the *Pre-Sal* findings) and its water, sun, and wind disposal for renewable energy. In 2010, showcasing a 7.5 percent economic growth, Brazil became the fifth largest world economy; however, an enduring slowdown since 2015 (GDP growth in 2016 was only 1.2) and escalating social inequality have cast doubt on the country's ability to reach its potential.²

Therefore, Brazil is an **emerging economy with a standstill development syndrome**: not only has it not yet reached its development potential, but also this potential in itself has been put in doubt many times. This policy brief argues that this syndrome concerns the different chosen development trajectories, which have swayed from the extractivism model to industrialization and back to extractivism. This way, development paths – how to push forward social-economic growth –

changed as political parties changed. Throughout its history, Brazil has experienced the commodities exporter model, the import substitution industrialization model, the neoliberal export orientation and the neoextractivist developmentalism model – all producing advances and setbacks while, most importantly, consolidating contradictions.

Typically, Brazil is not framed as an extractivist country, as its export basket is varied in terms of products. However, **figure 1** shows that agriculture and mining take around 70 percent of the total exports, signaling an agrarian-extractivist model. Nevertheless, the country is marked by the activity of extracting and selling natural resources.

FIGURE 1: BRAZILIAN EXPORTS 2020



Source: own elaboration.³

In fact, its name comes from the first raw material it exported: the red pigment saps from the Pau Brasil tree. Since then, Brazil has passed through the cycles of sugar, gold, diamonds, coffee and rubber that defined much of its demographic and geographical dynamics, class divisions, cultural norms and practices, and inequalities. In the 2000s, Brazil has become one of the world's biggest exporters of grains and raw materials.

Bolsonaro, a climate change denier and a mining enthusiast, potentialized the expansion of the Brazilian

¹ Data for 2022 from the World Bank databank. Access on 20/11/2022. Available at: <https://data.worldbank.org/>.

² Data from the World Bank databank. Access on 20/11/2022. Available at: <https://data.worldbank.org/>.

³ Data from UNCATAD Statistics database. Accessed on 05/12/2022. Available at: <https://unctadstat.unctad.org/EN/>.

agro-extractivist frontiers, showing remarkable disregard for socio-environmental struggles, indigenous rights, sustainability, or green transition. Lula's campaign promised to revert the damage done to the country's image concerning environmental protection. However, how this promise and others will be reached is still open to debate.

Brazil and its Many Development Paths

Like many other Latin American countries, Brazil embarked on the import substitution industrialization (ISI) path in the 1930s. Under the "national-popular pact" (Bresser-Pereira 2003), president Getúlio Vargas started changing the economy's core from the coffee sector to the industrial one. As a result, the industrial sector began to lead the GNP growth and employ more than other sectors in 1933 (Fonseca 2003). That continued in the first phase of the civil-military dictatorship, as the "authoritarian-modernizing pact" implemented tax reforms, expanded credit, facilitated the entry of foreign investments, and cut public spending – producing the "economic miracle."⁴ However, this growth disregarded a substantial increase in poverty, inequality, terrible work conditions, and income concentration. Moreover, while the militaries promised to "grow the cake to divide it then," they censured, tortured, and killed many civilians.

Moreover, debts accumulated during the dictatorship to promote mega infrastructure projects while the society became increasingly unequal. Finally, Brazil did not escape the 1970s crisis, and the 1980s became known as the "lost decade." Global demand for Brazilian products reduced, prices rose, and inflation escalated: the miracle was over. The dictatorship eventually ended in a context of hyperinflation and lack of growth. The militaries received full amnesty, and a new democratic constitution emerged in 1988. However, politically, turbulence persisted: Tancredo Neves, indirectly elected in 1985, died before assuming, and the first directly elected president, Fernando Collor de Mello, was impeached. Fernando Henrique Cardoso (1995-2003) was the first president to end two mandates without disruption since Juscelino Kubitschek (1956-1961).

⁴ Brazilian private companies concentrated on low-intensive sectors while multinationals took over capital-intensive fields. In turn, the military strengthened the state's role in strategic industries, such as energy, mining, arms, and roads.

Thus, to delve into Brazil's challenges ahead concerning development, growth and energy transition, this paper is divided into four parts. First, it presents Brazil's shifting development paths. Second, it frames Brazil as an extractivist country as part of its developmentalist agenda. Thirdly, it explains how *Bolsonarism* changed the country's political paradigm. Finally, it discusses Lula's promises, expectations, and limitations.

Economically, stabilization came after the *Plano Real*, which negotiated credit and reduced debt while welcoming neoliberal guidelines. Throughout the 1990s, the state-led industrial sectors weakened while an alliance between the international market and the financial and agrarian-mineral rentier elites strengthened (Petras 2013). The neoliberal path focused on the profitable sectors of mining and agriculture to the detriment of manufacturing. Moreover, Petrobras lost its oil and gas exploration monopoly in 1997, and the national Vale do Rio Doce was sold and became Vale SA. As a result, the industry value-added growth rate went from 11.7 percent in 1986 to -4.2 in 1992.⁵ This "liberal-dependent pact" managed to stabilize the currency but failed to reduce inequalities, control unemployment, or improve the quality of life of most Brazilian population.

Lula won his first election in 2002, promising a transition towards a "new national project of development" (Erber 2011). His political trajectory is riveting, considering the country's inequality standards. From a poor and *nordestino* labor union leader to the most-voted president in Brazilian history, Lula linked developmentalism to a broader participative democracy, forming a "popular-democratic pact" (Bresser-Pereira 2003). He focused on reducing poverty, implementing many social distributive policies to stimulate growth via mass consumption. In parallel, he boosted public investment, expanded credit, and promoted macroeconomic stability. The growth came from increased savings and investments, focusing on the domestic market, strengthening small and medium companies, and building infrastructure (Erber 2011).

Nevertheless, the commodities boom (2003-2008), spurred by the growing Chinese demand for raw

⁵ Data from the World Bank databank. Access on 20/22/2022. Available at: <https://data.worldbank.org/>.

materials, boosted short-term growth immensely. This way, in what Bresser-Pereira (2008) specified as a type of "Dutch disease" or Warnecke-Berger and Ickler (forthcoming) define as a result of the "seduction of rents," Brazil turned to the lucrative primary materials export sector to the detriment of continuing boosting its

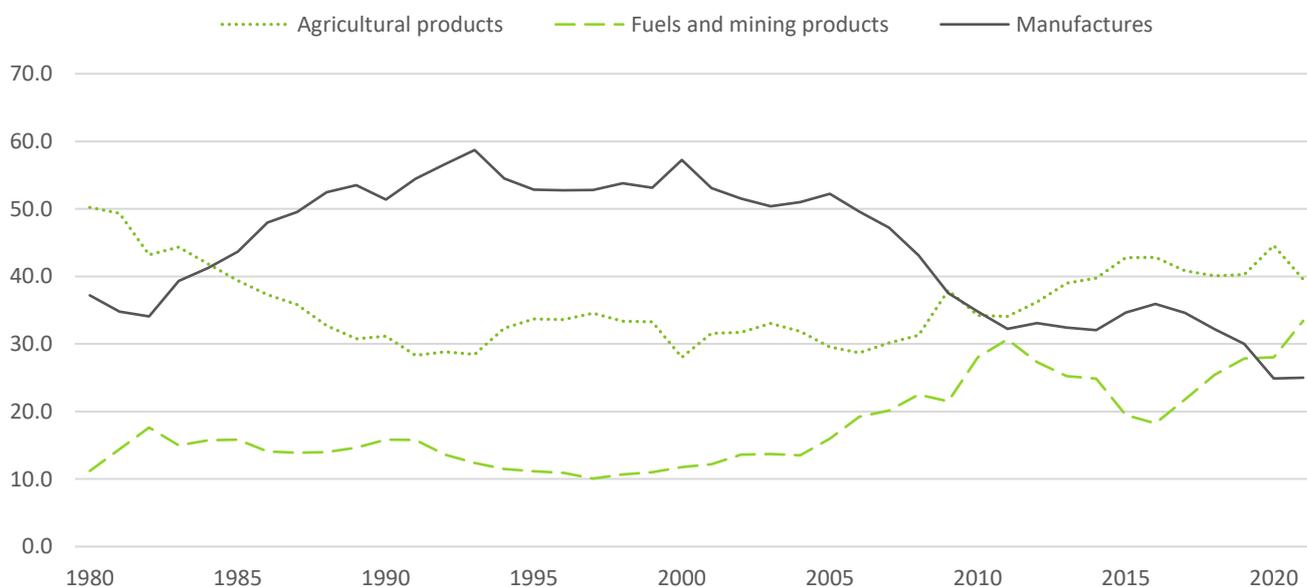
manufacturing, "re-primarizing" its economy. This way, Brazil's development path, which was heading toward industrialization after a setback in the 1980s and 1990s, was caught by the wonder of "neextractivism" – a developmentalist spin on the old extractivist model.

Brazil, a neoextractivist country

Neextractivism refers to left-leaning governments that appropriate rents from the extraction and exportation of natural resources to promote social distributive policies (Burchardt and Dietz 2014). With the commodities prices reaching new peaks, Brazil reoriented itself to exportations, becoming one of the biggest exporters of soy, cattle, and iron while reducing the exportation of textiles, transport, or manufactured goods (Petras 2013). Thus, the value increase of the Brazilian currency due to the exports eventually negatively affected the national manufacturing products, which lost competitiveness. **Figure 2** shows how the manufacturing sector started reducing its relevance on the export basket in the 2000s while agriculture, fuels, and mining increased.

The agribusiness sector reached astonishing growth numbers during the PT presidencies (from 2003 to 2015, including Lula's successor, Dilma Rousseff). Despite its connection with the agrarian reform movement, MST (Landless Workers Movement), a good part of the public funding went to rentier landowners of large properties (*latifundiários*), continuing the country's historically uneven land property distribution. This way, somewhat contradictory, PT supported two opposite agriculture projects: export-oriented agribusiness and family farming for domestic consumption (Soyer and Barbosa Jr. 2020). While it aimed at including new actors in the discussions concerning rural development, the traditional agribusiness actors kept assured their central

FIGURE 2: MERCHANDISE EXPORTS BY PRODUCT GROUP



Source: own elaboration.⁶

⁶ Data in Million US dollars (current) from the World Trade Organization Statistics database. Access on 25/11/2022. Available at: <https://www.wto.org>.

role in influencing policies to the detriment of the interests of small landowners (Dagnino 2016).⁷

Moreover, they encouraged the expansion of the oil and gas sectors, particularly after the discovery of *Pre-Sal* in 2007 (offshore reserves above geological salt deposits). Brazil has the world's biggest reserves of niobium, tantalum, manganese, iron, and bauxite – products that increased in value during the 2000s. New legislation increased Petrobras' power, guaranteeing the federal government more control of shares and, this way, ensuring a more significant part of the rents flew to the state (Pahnke 2018).

As a result, the Brazilian mining frontier expanded with massive mining projects, such as the one exploring iron and manganese in Carajás or Bauxite in Serra do Oriximiná, both in the Amazonian state of Pará. In 2011, the government started discussing a new law to regulate the sector to improve it while directing the rents toward social-inclusive development (Wanderley et al. 2020). Thus, it fits neatly into the neoextractivism narrative: using the rents for public spending on social issues.

Moreover, the government coupled mining projects with infrastructural and energy development plans, linking, for example, Vale to the consortium building the energy industry in Belo Monte. Nevertheless, a social-environmental disaster shook the country and paralyzed any discussions concerning expanding mining. On 5th November 2015, the Fundão dam at the Samarco Mariana Mining Complex (administrated by Vale and Australian BHP Billiton) collapsed, flooding toxic mud over villages and rivers in Minas Gerais. The accident killed at least nineteen people, provoked water shortages, contaminated rivers, displaced many families, and eliminated entire fish populations.

Less than a month later, the Chamber of Deputies accepted an impeachment process for President Rousseff. While she started with high popularity, exogenous and endogenous crises eventually became unmanageable, leading to a parliamentary coup that cannot be dissociated from the neoextractivism path. Brazilian growth, despite its magnitude, was partially conditioned by the primary-export sector and the inflow

of rents. Therefore, while the 2008 market crash did not hit Brazil hard, the reduction of the commodities price due to Chinese retraction did, inciting a series of budget shortfalls in an already colling down economy that incited opposition (Pahnke 2018).

On the one hand, Rousseff took several precipitated and inefficient measures. On the other, she attempted to stimulate investment by granting tax benefits to specific industries, frustrating the rentier agribusiness classes, who felt their economic and political dominance threatened (Andrade, 2020). As the commodities boom ended, many Latin American "pink tide" leaders started to feel the economic-political pressure, making agreements and concessions to extractivist and business elites (Ellner 2020). In her case, after a very tight reelection in 2014, Rousseff appointed a private bank executive as her finance minister and redirected policies aiming at pleasing the financial market.

The domestic pressures, however, kept going. Already shaken by protests in 2013,⁸ PT's developmental project eventually ran out of its course with the 2014 *Lava Jato* operation, which uncovered a vast corruption, bribery, and laundering scheme involving Petrobras, national and multinational construction companies, and many politicians and bureaucrats. As a result, PT was framed as the main corrupt party, Rousseff saw her popularity drop as she struggled to manage the economy, all while the commodities boom rents evaded and Petrobras lost much of its popularity and financial credibility.

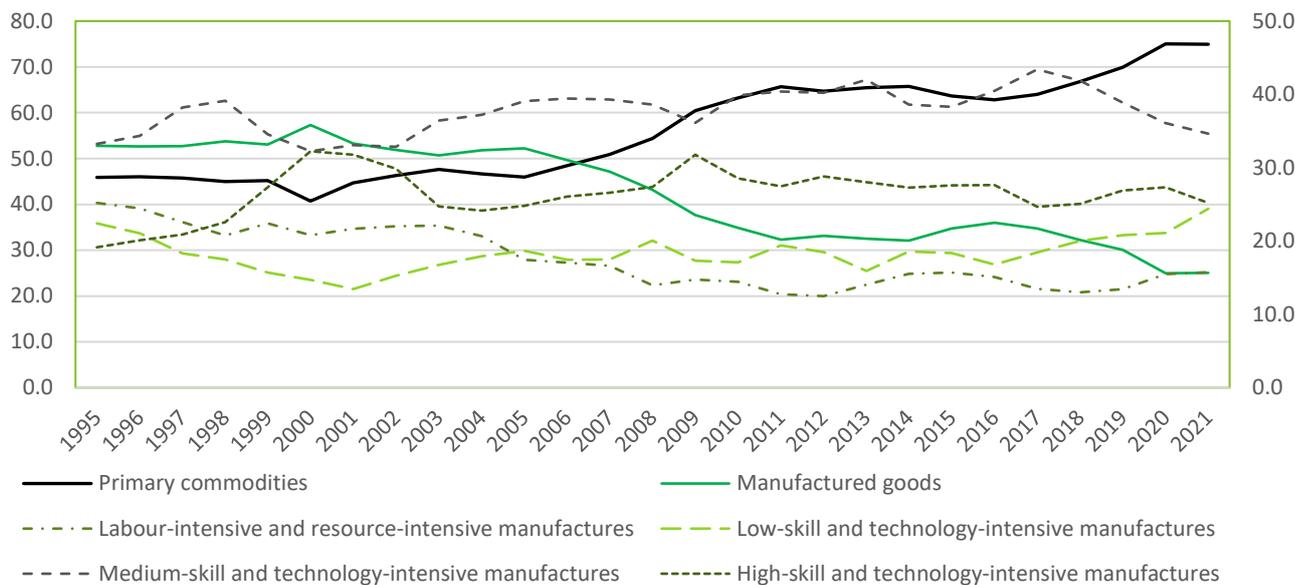
By 31st August 2016, Dilma was officially out of the presidency for fiscal responsibility law violation, as the opposition repeatedly failed to frame her as corrupt. Vice-President Michael Temer (MDB, Brazilian Democratic Movement) assumed the presidency (2016-2018) with the support of the "*Centrão*" (parties with few ideologically binding convictions that tend to migrate among coalitions for favor exchanges) and made a neoliberal turn: reducing governmental spending on social policies, adopting austerity measures, and seeking privatization. Moreover, he closed many ministries, pressed reforms regarding social

⁷ It is important to stress that the National Bank for Development (BNDS) had an essential role in financing big agribusiness and mining companies. Between 2002 and 2012, the parcel of BNDS' funding towards oil, gas, mining, and energy went from 54% to 75% (Milanez and dos Santos, 2013).

⁸ Already in 2013, originally left-leaning demonstrations initiated by the *Movimento do Passe Livre* (Free Fare

Movement) were soon taken over by different groups of people dissatisfied with an economic slowdown, depreciation of the Brazilian Real, and corruption. Among them, a new conservative, extremely anti-PT and proto-fascist movement began to emerge – one that would ultimately support Jair Bolsonaro's candidacy.

FIGURE 3: MERCHANDISE TRADE MATRIX



Source: own elaboration.¹¹

security and passed the PEC 241/55, a constitutional amendment that froze the public spending ceiling for the next twenty years.⁹

Additionally, he approved many new flexibilization measures concerning environmental and labor laws that increased the participation of companies in public administration organs and reduced the role of civil society in the decision-making process concerning the exploitation of nature. The goal was to cut costs by creating self-regulation systems, voluntary programs of social corporative responsibility, and policies to attract more foreign capital (Wanderley et al. 2020). Thus, the government abandoned the "neo" in neoextractivism, diminishing the state interference in the extractivist sectors, decoupling the rents from social investment, and becoming less mindful of environmental disputes. Moreover, the ministerial changes concentrated agriculture and environment portfolios under the power of agribusiness, forcing policy cuts and more violence in the countryside (Soyer and Barbosa Jr. 2020).¹⁰

Figure 3 exposes how acute was the process of de-industrialization. Not only primary commodities overcame manufacturers, but also, as the right scale shows that the level of complexity within the manufacturing sector has also reduced, with low-skill and technology-intensive products rising while high-skill and medium-skill decreased.

With Temer, policies to stimulate mining and agricultural expansion were no longer attached to any social-inclusive or industrial development. Instead, violence and oligopolies become efficient tools to paralyze social movements, reject contestation regarding extractivism, eliminate institutional spaces for discussing agrarian reform, and endanger food sovereignty (Soyer and Barbosa Jr. 2020). However, while the neoliberal agenda was implemented as a solution, the economic measures Temer implemented did not reduce recession nor promote economic recovery. Enters Bolsonaro.

Bolsonaro's Turn: a Paradigmatic Change

⁹ This project's restriction level, particularly considering education and health, led the opposition to name it the "Death PEC."

¹⁰ Public policies toward family farming were severely harmed, as well as the funds for institutions such as INCRA (National Institute for Colonization and Agrarian Reform), FUNAI

(National Indian Foundation) and IBAMA (Brazilian Institute of Environment and Renewable Natural Resources).

¹¹ Data from the UNCTADStat database, data in Thousand US dollars (current) per year. Access on 20/11/2022. Available at: <https://unctadstat.unctad.org/EN/>.

With the acquiescence of the mainstream media, the *Lava Jato* operation went over its lengths to persecute politicians, often showcasing partiality and judicial misconduct (Moretzsohn and Pinto 2020). The lead judge, Sérgio Moro, arrested Lula in April 2018 for receiving bribes, including an apartment in São Paulo. While Moro had "strong convictions" of Lula's corruption, the Supreme Court and the UN Committee agreed – after 580 days – that the judgment was biased and allegations did not have enough grounding for condemnation (STF 4/15/2021; United Nations 4/28/2022). In November 2019, Lula was freed. The damage, though, was already done.

Damage because by August 2018, Lula was pooling as the lead candidate for winning the October presidential elections (G1 8/22/2018). Only in September, when PT officially announced the candidacy of Fernando Haddad, did Bolsonaro rise to the top. Bolsonaro comes from the lower ranks of Brazilian politics, migrating for 27 years from one *Centrão* party to the next as a federal deputy after being forcefully retired from the military due to insubordination. He became notorious nationwide due to his provocative, vile, and aggressive rhetoric. Nevertheless, personifying the people's anger with crises, Bolsonaro presented himself as an outcast, delinked from corruption and the candidate for change.

For the first time, a candidate from a then-small party, PSL (Social Liberal Party), without any coalition and with almost no TV time, won the election. This novelty exposed a crack in traditional parties' balance of power. On the one hand, there was a transference of voters from the traditional right to the new far-right as the Temer coalition could not dissociate itself from corruption (Santos and Tanscheit 2019). On the other hand, PT lost most of its "oppositional edge" after not negotiating power and class relations while in power. To Andrade (2020), PT improved the poor's lives materially but did not promote their active engagement, stimulating political lethargy and constraining the unity of its own social base. This way, by assuming a moderate concept of democracy, PT, more often than not, used the poorer and excluded people instrumentally, disengaging itself from their class struggle and thus losing grounding with them.

Moreover, Bolsonaro brought morals to the forefront of the paradigmatic debate of what it means to be left or right in Brazil. Since re-democratization, this discussion has centered on two options of development strategies: developmentalism or neoliberalism. For *Bolsonarism*,

being left or right links to themes like nationalism, xenophobia, gender, migration, and LGBTQ+ diversity (Santos and Tanscheit 2019). For them, progressiveness threatens the "traditional Christian family," meaning those who align with these ideas are from the left. Following the steps of Donald Trump, Bolsonaro proposed a policy that would be "liberal on the economy and conservative on the manners," putting "Brazil above everything and God above all" (Carvalho and Paiva 2022). Rather quickly, this moral discussion took hold of the country.

In a nutshell, the *Bolsonarism* agenda calls for a non-interventionist, minimal state that promotes austerity and privatization; a firm hand against corruption; flexibilization of arms control; reduction of the age of criminal responsibility and reversion of progressive agendas related to gender, sexuality, and abortion rights (Kalil 2020). It has three branches: 1) religious-conservative, which is anti-globalist, moralist, anti-scientific and fearful of the communist threat; 2) *Lava Jato*-militarist, composed of the military, jurists, and police officers that support more assertive executive authoritarianism for establishing order; 3) privatization-neoliberals, associated with the financial market, business owners, banks, and agribusiness. This way, by blatantly uniting these three fronts under a moralist-conservative platform, Bolsonaro combined a distorted yearning for the military period – authoritarianism and order – with neoliberalism and religious activism.

Bolsonarism is most present at the *Bancada Ruralista* or Rural Parliamentary Front (FPA), the agribusiness caucus in both legislative houses. This caucus' priorities range from a less rigid forest regulation to reducing indigenous lands, liberalization of pesticides and transgenics, renegotiation of debts, hunting flexibilization, and facilitation of export regulations (Cioccarri and Persichetti 2020). Bolsonaro has frequently supported agrarian and mining elites while attacking MST, family farming, indigenous people, and traditional communities. Moreover, stressing that the country has an unused richness under its soil – a "gift from God" – that needs to be explored, Bolsonaro sees mining as the path to take people out of poverty (Robinson 2021). Thus, not surprisingly, Bolsonaro strengthened the FPA's power, giving the Minister of Agriculture to Tereza Cristina, ex-president of FPA, and the Environmental Ministry to Ricardo Salles, who has been criminally charged for altering zoning maps of environmentally protected areas to favor mining companies when he worked in the São Paulo City Hall.

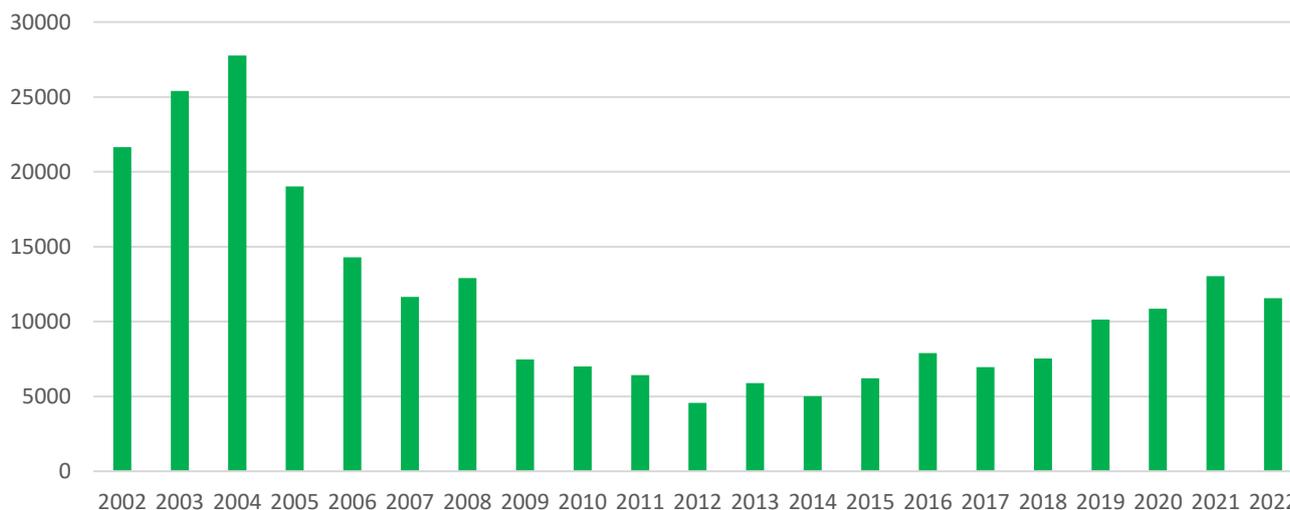
Most importantly, Bolsonaro has always been against indigenous land demarcation, arguing that they deprive Brazilians of their sovereignty. However, the Brazilian constitution recognizes the nation's multiculturalism and protects indigenous people's rights over their territory. Therefore, since 1988, it has been a federal responsibility to recognize and demarcate these lands, giving protection and exclusive usufruct of the resources. Yet, in the last decade, Amazon has become an ever-expanding frontier for agro-mineral extraction, and the agents promoting deforestation, land invasion and looting felt emboldened by the new government.

Since in power, Bolsonaro has put into practice a policy of dismantling the mechanisms of environmental protection and weakening the means of auditing and penalizing environmental violations (Verdum 2022). Deforestation increased by 62 percent in the first year of

Dilma, were systematically weakened in the last four years.

Also, the government pushed law projects to reduce indigenous autonomy over their lands. Here, it is important to stress two: PL 191 and PL 490. The first aim at enabling mining and transgenic farming on indigenous land without the approval of indigenous communities. Conversely, PL 490 proposes a retroactive evaluation of demarcations based on proof of land ownership on the year the constitution was promulgated – something that many communities do not have. Both projects are being discussed and have provoked outrage among communities and environmental organizations. It is estimated that, if they are approved, more than 160 km² of the Amazon would be deforested to prioritize mining and intensive farming (APIB and Amazon Watch 2022).

FIGURE 4: AMAZON AREA DEFORESTED PER YEAR IN KM²



Source: own elaboration.¹²

Bolsonaro's government (Assis et al. 2019). Moreover, the government was, in 2022, evaluating 2500 mining license requests by 570 international and national companies, totalizing an area of 101 km² that overlapped with 261 indigenous lands (APIB and Amazon Watch 2022).

Figure 4 shows how the tendency to reduce Amazon deforestation, detected during the PT's governments (2003-2016), was reverted, constantly increasing during Bolsonaro's government. That indicates that the controlling mechanisms, strengthened with Lula and

Between 2010 and 2020, illegal artisanal mining (*garimpo*) increased in indigenous lands by around 495 percent (APIB and Amazon Watch 2022). Thus, contamination of rivers, health problems, land looting, violence and cultural violation is becoming increasingly common for indigenous people (Robinson 2021).

Furthermore, economic stagnation due to Covid-19 further boosted artisanal mining, and the government's connivance, along with the dismantling of the control institutions, led to a new boom of extractivist sites in Amazon (Assis et al. 2019). Finally, mining activities –

¹² Data from PRODES (Monitoring the Deforestation of the Brazilian Amazon Forest by Satellite), accessed on 05/12/2022. Available at

<http://www.obt.inpe.br/OBT/assuntos/programas/amazonia/prodes>.

both industrial and artisanal – served as a transmission vector of Covid-19 to vulnerable communities (Wanderley et al. 2021).

Thus, the Brazilian image concerning environmental protection has profoundly transformed in four years. While the international community became concerned about the growing deforestation, wildfires, and promoting laws, Bolsonaro rejected foreign meddling, accused local NGOs of misconduct and insisted that excessive environmental control impeded economic growth (Ellner 2020). At the UN, Bolsonaro said that the "indigenous person does not want to be a poor landowner on rich lands" and that the international critics have "awakened our patriotic feeling" (Verdélío 9/24/2019). In this context, another environmental tragedy happened in January 2019: the Brumadinho dam collapsed, killing 270 people, polluting rivers, and destroying villages. On top of that, Brazil became a place of high risk for activists and environmental investigative journalists, visible during the brutal assassination of British journalist Dom Phillips and the indigenist Bruno Pereira in June 2022.

In a nutshell, *Bolsonarism* consolidated a strong political coalition, very active and ideologically driven, that

| Brazil chooses Lula: now what?

While Bolsonaro could present himself as an outsider in 2018, people had already experienced *Bolsonarism* in 2022 and its neoliberal, conservative, agro-extractivist and anti-globalist agenda. Moreover, the government managed the Covid-19 pandemic poorly, with more than 600 thousand deaths, delays in ordering vaccines and a president that promoted unproven treatments and questioned the vaccine's worth. On top of that, the inflation over consumption prices went from 3.4 percent in 2017 to 8.3 percent in 2021, unemployment went from 12.8 percent in 2017 to 14.4 percent in 2021, and 29.6 percent of the population is under the poverty line.¹³¹⁴

Rumors, absence of fact-checking, violence, lack of discussion concerning political programs, and

combines parties from the right and the *Centrão* by a moralistic, militaristic, and neoliberal narrative, symbolizing the end of the "ashamed right" and the open mobilization via identitarian categories linked by conservatism (Quadros and Madeira 2018). That can be seen with the easiness with one talks today about the BBB lobby (*boi, bala* and *bíblia* or cattle, bullet, and bible) that combines agribusiness elites, military and security forces and evangelical conservative fronts. They oppose all that goes against their interests, including mitigating climate change, protecting indigenous land, and international calls for environmental action – in other words, the "progressive agenda."

In four years, the traditional right saw itself as drained of meaning for being too liberal. At the same time, the left found itself fighting a narrative in which all progressiveness is labeled as "communism" while being accused of causing the country's economic, social, and moral collapse (Andrade 2020). All that remained, therefore, was the nostalgic power of the country's most conciliatory, pragmatic, and popular leader: Lula. When the race officially started in August 2022, it was extremely polarized: one needed to choose between anti-*PTism* or anti-*Bolsonarism*.

accusations from both sides permeated the elections.¹⁵ Bolsonaro used his role as incumbent president to influence the election, altering cash-distributional programs, reducing gasoline prices and pushing for constitutionally dubious law projects. At the same time, Bolsonaro contested the legitimacy of the voting machines, preparing the ground to cast doubt on the results.

Conversely, Lula formed the "hope coalition," a seven-party alliance combining left and central politicians interested in blocking the democratic threat that is *Bolsonarism*. This alliance received support from a broad spectrum of politicians, artists, economists, and national and international organizations. The final paragraphs present the key objectives driving this broad coalition.

must face, the campaigns focused on who was more or less religious, more or less corrupt, and more or less patriot. Issues of women's reproduction rights, LGBTQ+, race and indigenous rights were determinant to define an anti-Lula or an anti-Bolsonaro.

¹³ Inflation and unemployment numbers from the World Bank databank. Access on 20/11/2022. Available at: <https://data.worldbank.org/>.

¹⁴ The number on poverty is from the Map of New Poverty from the Fundação Getúlio Vargas (2022).

¹⁵ Especially during the second round, instead of discussing proposals concerning the social-economic distress the country

They are: to improve capabilities for environmental protection, promote reindustrialization, return to a proactive and constructive foreign policy, strengthen the political role of indigenous communities, and rearrange agriculture to strengthen food security. The session ends by arguing that these objectives can only be reached with much political compromise and negotiation.

First, Lula employs the theme of **environmental protection** to pursue many interconnected goals. They are: 1) show climate change awareness, rejecting any negationist position, 2) seek international protagonism in multilateral fora, 3) protect the Amazon and promote the indigenous movement, and 4) link green transition with the need to re-industrialize the country, accessing the most advanced and eco-friendly technology available. The coalition program affirms a "commitment with the social, environment and economic sustainability and with facing the climate change" that would demand "changing the pattern of production and consumption of energy in the country, engaging with the global efforts" as the "climate emergency imposes itself and science leaves no room for doubt that the costs of not facing the climate problem are unacceptable" (Coligação Brasil da Esperança 2022).

The program states that the Brazil must be a protagonist of the world's ecological transition, "inducing the construction of new capacities of the national productive structure at the frontier of knowledge and generating technology and innovation" while combating "the predatory use of natural resources" and "encouraging economic activities with less ecological impact" (Coligação Brasil da Esperança 2022). This way, Lula connects environmental protection and green transition with the need to **re-industrialize** Brazil and promote sustainable growth. He pledged to "revert the process of de-industrialization and promote a reindustrialization of broad and new sectors and those linked with the transition to a digital and green economy" while "supporting the creativity of our businesspeople and entrepreneurs" and exploring "the economic and social potential of the biodiversity economy" (Coligação Brasil da Esperança 2022).

That will be one of the fundamental driving forces of Lula's **foreign policy recalibration**. He is interested in international deals and attracting foreign investments that push structural transformation and diversification forward and away from the extractivist development path. In his victory speech, he said, "we are not

interested in trade agreements that condemn our country to the eternal role of commodities and raw material exporter" (G1 2022). This way, European actors, notably those promoting energy transition, must see this as a window of opportunity to dynamize their partnership with Brazil, focusing on technological and scientific transfer that enables this transition away from the extractivist model. However, the issue of sovereignty must not be taken for granted, as Brazil will be promoted as a global leader in the environmental cause, not a client. According to Lula, the country is open to "international cooperation in terms of research or investment to preserve Amazon, but always under the Brazilian leadership, without ever renouncing our sovereignty" (G1 2022). Actors interested in engaging with this greening transformation project must be acutely aware of these factors.

The new government will make amends with traditional international partners to **reestablish the Brazilian image**. Most countries celebrated Lula's victory quickly, indicating relief and high expectations – for example, Germany and Norway indicated they would reactivate the Amazon Fund, frozen since 2019. In November, Lula brought a plural team to the COP27 in Egypt and was warmly received by world leaders, international organizations, and many representatives of civil society. He said that "fighting climate change will have the highest profile in the structure of the government" (Da Silva 2022). He also announced plans to construct a Summit of the Member Countries of the Amazon Cooperation Treaty and a Global Alliance for Food Security, as well as build a strong cooperation between Brazil, Indonesia, and Congo to protect tropical forests – projects that international partners should strongly support.

These plans link with a second central point for Lula's international relations: promoting Brazil as a **South-South leader**. The coalition's program promises to "reconstruct the South-South international cooperation with Latin America and Africa," "maintain regional security and promote a regional integrative development based on potential productive complementarities," "strengthened Mercosul, Unasul, Celac and Brics," and "work for a new global order committed to multilateralism, respect for nation's sovereignty, peace, social inclusion and environmental sustainability" (Coligação Brasil da Esperança 2022). However, with a global recession, malfunction of international organizations, the Russian war and growing competition between the United States and

China, there is less space for the constructive, South-South emerging country's discourse. Most importantly, even if there is a commodities price increase, it is not the 2000s commodities boom – limiting the government's ability to use rents for social programs domestically and infrastructure projects internationally as it once did.

During Bolsonaro's government, indigenous movements gained international recognition due to their prominent role in contesting the government's connivance with Amazon's destruction. In his first speech after the results, Lula promised to give them centrality, stating a "**commitment with the indigenous people** and the biodiversity" and that in the Amazon, he would "fight any illegal activity – being *garimpo*, mining, wood extraction or illegal agribusiness occupation" while proving that "generating richness without destroying the environment" is possible (G1 2022). Furthermore, he pledged to create a Ministry for Indigenous People and, concerning mining activities, to strengthen institutions capable of controlling and punishing illegalities.

However, one should not imagine that the country will assume an anti-extractivist standing. On the contrary, the coalition program states that "the mining activity should be stimulated through greater internal industrial linkages and commitment to environmental protection, worker's rights, and respect for the local community" (Coligação Brasil da Esperança 2022). Moreover, firmly against privatization of energy sectors, the program pledges to "reconstruct the inductive and coordinating role of the state and state companies" so they can fulfill "their role in the process of economic development and to the social, productive and environmental progress" (Coligação Brasil da Esperança 2022). Therefore, Lula is promoting a return to the neoextractivism ideas, in which a strong state can regulate extractivist activities and redistribute the rents in a manner that produces socio-economic growth. The main challenge here is that there is no commodities boom, meaning there will be much fewer rents available to be redistributed.

Concerning **agriculture**, the recent growing food insecurity is directly linked with the configuration of agribusiness in Brazil, which has favored the production and concentration of large-scale exports monocultures to the detriment of small and medium farming (Chamma et al. 2021). Soy, meat, corn, and sugar are not oriented for the domestic market, but exports and are much affected by inflation. In fact, around 70 percent of Brazilians consume food from small farms, social cooperatives, and MST or *quilombolas* communities

(Mitidiero Junior and Goldfarb 2021). Aware that it is necessary to change the dynamics in the rural spaces that today pressure the small farmers to abdicate their land or reorient their production to monoculture, Lula is promising to invest in modernization and infrastructure while increasing the credit for small and medium food producers. Furthermore, arguing for sustainable and eco-farming, Lula has insisted that "we do not need to deforest not even a meter to continue being one of the biggest producers of food in the world" (Da Silva 2022).

In other words, Lula will attempt to shift the commodities exporter paradigm to a focus on domestic markets and food sovereignty. At COP27, he affirmed that agribusiness is a "strategic ally" for building "sustainable and regenerative agriculture, investing in science, technology and education in rural spaces" (Da Silva 2022). However, this will not be a simple task. While Bolsonaro lost, *Bolsonarism* won in 2022: 14 out of the 20 candidates Bolsonaro supported for the Senate won, and his party (PL) was the one that elected the most federal deputies, making the BBB front stronger than ever in both houses (Ribeiro 2022). Moreover, many of Bolsonaro's ex-ministers are now elected politicians – including Tereza Cristina and Ricardo Salles, who support the expansion of the agrarian and mining frontiers. Thus, *Bolsonarism* is an established political movement that will test Lula's ability to avoid gridlocks, pass legislation and alter budgets.

It will be necessary to unfreeze the state budget for these promises and others to be reached, as well as to reestablish social programs that were cut during Bolsonaro. That and accessing other funds will demand several negotiations, as the opposition is the majority in both houses. Thus, **compromise** will be essential. Lula already pledged to rule for all Brazilians, as a comprehensive democracy coalition pact is essential. It is, therefore, naïve to think this will be a left-wing government. The only collective political agenda of the "hope coalition" is to return Brazilian democracy to normalcy, rekindle the working relationship between the three powers and improve the distribution of ministerial responsibilities. Formed by a comprehensive group of politicians representing different interests, maintaining this unity throughout the four years will probably be impossible.

While there was fear that Bolsonaro would attempt some mechanism to hold power, it seems he will assume a leadership position of *Bolsonarism* from a distance. The transition of power is already on course, led not by

Lula but by his vice-President elected, Geraldo Alckmin (PSB, Brazilian Socialist Party). The transitional team is extremely broad, ranging from representatives of socialist social movements to economists that designed the *Plano Real* – yet another indication that the government will seek pragmatism, not a left-wing turn. Opposition, hostility, and resistance will be found inside the two houses and among many influential groups that

Conclusion

This *Extractivism Policy Brief* argued that Brazil is an emerging country with a standstill development syndrome because its development path choices have changed considerably according to who has been in power. After four years of a confrontationalist, denialist, and extremely extractivist government, Brazil is once again facing a turn on its development path with Lula's election. Lula is a developmentalist leader: his platform is to reduce poverty, build infrastructure and improve people's livelihood while guaranteeing a strong state capable of conducting this progress. For him, this pathway is through industrialization and modernization – if using green technology. He will use his significant international political capital to push for a green technology transition.

Lula aims to restore the traditional Brazilian role in multilateral politics, rebuild relations with traditional partners and return the country's position concerning climate action while standing critical to global hierarchies and inequalities. Promoting environmental protection and defending indigenous rights entered the forefront of the political struggle in Brazil, and its prioritization is the most significant novelty in Lula's position compared to his previous governments. However, any excitement must also be cautious. Lula will face much more restrictive international and domestic scenarios. Moreover, while he will seize the opportunity to present himself as a regional integration and South-South leader, it is hard to imagine he will risk political ground to present himself as a leader of a new "pink tide" – ties with a more radical Latin American left, notably Venezuela and Ecuador, are a touchy topic not only for the right wing, but also for politicians more in the centre of the political spectrum - not fully affiliated with left or right - that aligned with Lula in this election.

Therefore, the broad coalition required to defeat Bolsonaro means this will not be a government of change but one of transition – rebuilding the state

gather supporters in the military, churches and civil society via identitarian causes. *Golpismo* is still in the lure, as many anti-democrat protesters are still camping (a month after the election) in front of military institutions demanding a new anti-left dictatorship. *Bolsonarism* – and its stronghold among evangelicals, military, and agribusiness elites – will force Lula to keep domestic politics as his main priority.

institutions, rearranging the power relations between the three powers, reducing the dissemination of militaries in politics, repairing trust in the democratic process and controlling the spread of proto-fascists ideas. Moreover, the economy is the biggest challenge and replacing the neoliberal paradigm with developmentalism will force Lula to negotiate with hostile actors for left-leaning policies. While we cannot be sure of what will be *Bolsonarism* without Bolsonaro, it is there to stay, and Lula will have to pick his fights to maintain his coalition on his side to guarantee working conditions. While, for sure, "Brazil is back" (Da Silva 2022), it is back with all its contradictions.

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EXTRACTIVISM

| The Project

The collaborative research project ***extractivism.de*** links the Universities of Kassel and Marburg. The project scrutinizes the extractivist development model and proposes new economic, political, and sociological conceptions of extractivism. It preliminarily focuses on Latin America and the Maghreb patterns. The project researches the conditions under which these patterns affect the persistence and transformative capacity of extractivism and its respective institutional settings. Finally, it explores how extractivism affects cultural processes and habitual routines and questions under what conditions and how far the development model extends into institution-building and social practice, i.e., everyday life.

The project aims to understand extractive societies not as deviants from the Western development trajectory but in their own logic and particularities. The project, therefore, combines a solid empirical focus with theoretical work. It links both broad field research and data gathering of primary data and the qualitative and quantitative analysis of available secondary sources with a stringent transregional comparison. It develops methods in cross-area studies and investigates whether and why similar patterns of social change emerge in different areas and world regions despite significant cultural, social, or religious differences. Finally, the project intends to translate the findings for politics, society, and development cooperation.

Please visit www.extractivism.de for further information.