The Brazilian elections

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Theme
The upcoming Brazilian elections are unfolding in an atmosphere of intense political and economic crisis, and it is not yet clear whether the second round will once again shape up as the classic confrontation between the Workers’ Party (PT) and the Brazilian Social Democracy Party (PSDB).

Summary
With the former President, Dilma Rousseff, out of office as the result of a polemical impeachment and with Luiz Inacio ‘Lula’ da Silva in prison after having been a priority target of Operação Lava Jato, the electoral future of the Workers’ Party (PT), along with the future of Brazilian politics, remains highly uncertain as the country faces the October presidential elections. Before being disqualified by the courts, Lula led the polls while the current President, Michel Temer, was rejected by more than 80% of Brazilians and unemployment was running at 13%. This suggests that Brazil’s next election will be anything but trivial. Some have even to come to see the upcoming contest as a face-off between ‘civilisation and barbarism’: the traditional parties and candidates on the one hand against the extreme authoritarian right on the other, the latter represented by Jair Bolsonaro, a true anti-democrat.

Analysis
A turbulent context
If political analysts agree on anything with respect to Brazil it is that the elections will be historic. Brazilians will go to the voting booths two years after a highly controversial impeachment of the former President, Dilma Rousseff. Described by many as a ‘juridical-parliamentarian coup d’état’, the impeachment gave rise to a dramatic political rupture and a deep social trauma. It increased the fragility of the democratic order and accelerated the processes of political degeneration and a growing loss of confidence in representative structures.

Luiz Inacio ‘Lula’ da Silva –the best-known President in the history of Brazil, who rose to power with a record 87% approval rate– has been detained in the Federal Police Prison in Curitiba since April 2018. Although Lula is in jail, nevertheless, he paradoxically commands the electoral strategy of the Workers’ Party (PT) from his prison cell. And even though he is behind bars and disqualified from being a candidate, he is backed by a 39% intended vote. By contrast, Michel Temer is the most rejected President in the history of the re-democratised Brazil, with an approval rating of less than 4%.
Temer lost the confidence of the markets with his hapless management. The political party closest to him –the Brazilian Democratic Movement (MDB)– is also mired in a number of serious corruption scandals. Its leaders behave more like the ‘strongmen’ owners of Brasilia than like the citizens’ elected representatives. Indeed, post-Lava Jato Brazil has inherited a strong anti-political sentiment and a splintered and polarised society. On the one hand, there are those who think that the anti-corruption campaign is nothing more than the political persecution of the PT, a campaign that crushes the rule of law and ignores the guarantee of due process for the accused. On the other hand, there are those who praise Operação Lava Jato, arguing that political power in Brazil is corrupt and that prison is the only way to bring the plague to an end.

The recent anti-corruption campaign (at least in its Lavajista form) is led by a politically militant judicial branch that does not respect the balance of power and stoops to the tactic of exploiting the spectacle of populist justice. Preoccupied more with public opinion and media exposure than with the prudence and impartiality that should guide such a process, the judges have engaged in a routine dramatisation of justice, seeking to attract large audiences through marketing techniques. The transformation of justice into a ‘hyper spectacle’ (since the Mensalão scandal in 2005), along with the increasing role of the media as a court of justice, has served to convince the electorate that all politicians are corrupt. The direct association of politics with corruption promotes authoritarian and anti-democratic political stances which are inevitably portrayed as anti-system and controlled by outsiders.

The central issues of these elections have revolved around the economic, political and public security crises plaguing the country. With unemployment at 13%, investment significantly down and GDP growth of only 0.4% in the first quarter of 2018, economic issues continue to dominate political debates. In addition to economic problems, public safety concerns continue to provoke social unrest. The PT failed to address the issue, guided as it was by the flawed perspective that rising incomes and expanding work in the formal sectors would lead directly to a decline in violence and crime. The Temer government has also been incapable of resolving this issue; it has only offered a militarised response to public security challenges –as revealed by the federal intervention in Rio de Janeiro–. Such action is nothing more than electoral fireworks and produces no concrete results. Violence in Brazil cannot be resolved by placing increasingly heavily-armed military personnel on the streets; a better life and future must be made possible for the urban youths who die and kill. Brazil has more than 60,000 violent deaths a year, and there are more than 700,000 people in its prisons. No-one knows how to solve the problem.

Any elected candidate will have to face a broad range of challenges. First, the economy: the markets expect the pension reform to be approved. However, the reform –both polemical and far-reaching– will only be possible with solid parliamentary alliances to back the vote, something that will be difficult to achieve. Other reforms are also urgently needed. Tax reform will be required (as the current fiscal regime favours the richest and places an excessive tax burden on the poor). Political reform is also needed to reduce the number of political parties in Parliament (currently 37), to cut back the increasing cost of election campaigns and to prevent certain partisan coalitions from obstructing parliamentary work.
If the PT wins the election, the rhetoric of *coup d'état*, of the political persecution of *Lava Jato* and of the political imprisonment of Lula will have emerged victorious. However, the party would then be faced with the challenge of regenerating its image and governing with a very conservative Congress that will likely prevent it from approving many of the progressive initiatives included in its electoral programme. The election of 2014 gave rise to one of the most conservative legislatures in Brazilian history (or at least during the most recent period of democracy). There are large numbers of deputies from evangelical and business parties (and from among the large landowners) who favour a tough law-and-order agenda for public security. This 2014 scenario appears set to reproduce itself in 2018.

The centre-left and... the extreme right

Lula is —without a doubt— the outstanding symbol of these elections. On 31 August the Supreme Electoral Court (*TSE*) determined that Lula da Silva had lost his political right to present himself as a candidate. The PT executive had earlier registered Lula’s candidacy and then decided to officially maintain it, although in practical terms Lula had been disqualified. There are two explanations behind such a strategy: on the one hand, Lula is the most valuable political asset in PT history; on the other, the PT continues to wield the discourse that the former President is indeed a political prisoner, the victim of a *coup d'état* and of organised judicial persecution to block his candidacy and his otherwise likely victory. In basic terms, it is a battle to win both votes and the narrative.

Lula leads all the polls at levels that could be considered extraordinary (38%-39%). Public opinion surveys from last April reveal that 50% of Brazilians believe Lula’s imprisonment was right (compared with 40% who consider it unjust). Half the country believes that justice should ban him from participating in the elections while 48% think the opposite. It is ironic that a jailed candidate can come close to winning the elections in the first round —were he able to stand as candidate—.

The elections will take place on 7 October. Given the impossibility of Lula’s candidacy, the PT is stretching out the relevant legal periods to the maximum, resorting to appeals and other judicial footwork to keep Lula’s name on the electoral registry as long as possible, before replacing it only at the last possible moment. After the TSE’s decision, the last legal move available is a final appeal to the Supreme Federal Court. But, almost certainly, the high court will also reject Lula’s candidacy. The deadline established by the magistrates is 11 September, when the PT lawyers are expected to definitively rule out the former President as a candidate. All indications suggest his place will be taken by Fernando Haddad, previously registered as the Vice-Presidential candidate. Haddad has an ample curriculum as Minister of Education from 2005 to 2012 and as Mayor of São Paulo from 2013 to 2017 but is little known in many regions of the country. Although Lula no longer appears as the candidate in PT campaign material, his legacy and imprisonment are still clearly emphasised in order to exploit his political capital to the maximum in an attempt to transfer votes from Lula to the definitive PT candidate.

The PT is betting on the possibility that by associating the images of the two leaders, with Haddad taking up Lula’s vote as the campaign progresses: thus, Lula becomes
Haddad. The potential to transfer votes from the former to the latter is the single factor that in large part will determine the outcome of the election. According to the latest *Datafolha* durvey (20 and 21 August), Lula has 39% support, followed by Bolsonaro (Social Liberal Party, PSL) at 19%, Marina Silva (Sustainability Network) at 8% and Geraldo Alckmin (PSDB) at 6%. With Lula out of the race and Haddad in his stead, Bolsonaro rises to 22% and Silva to 16%, but Haddad trails behind with a mere 4%. Intended blank and spoiled votes would also double to almost 22%. However, according to the results of a survey by XP Investments (27 and 29 August), when people are directly informed that Lula is backing Haddad—as electoral campaign material made clear throughout September—support for the former Mayor rises to 13%, guaranteeing he passes to the second round.

For the moment, the other noticeable beneficiary of vote transfers would be Marina Silva, the Minister of Environment under Lula. While Haddad remains unknown to a large part of the electorate, particularly in the North-East, Marina Silva is known to 93% of Brazilians. According to *Datafolha*, 27% of voters have never even heard of Fernando Haddad. Nevertheless, most if not all analysts argue that as the campaign progresses, Haddad will intensify his trips to the North-East, PT propaganda will increasingly associate his image with that of Lula and the former Mayor of São Paulo will gain visibility in the process and wrest votes from Marina Silva.

The same problems that drained her strength as a candidate in 2014 continue to affect Marina Silva today. During the last election, she was the vice-presidential running mate of Eduardo Campos. However, after Campos died in an air crash, she became the favourite of the electorate. Still, she has not positioned herself clearly during certain crucial national moment and her identity remains confused. She is an evangelical but does not represent many evangelicals. She is a progressive, but many identify her as an evangelical. She is considered to be close to Lula, but she defended *Lava Jato*. And while she defines herself as the sustainability candidate, her 2014 campaign was financed by Itau Bank and the company Natura. Nevertheless, Silva represents a moderate third way that attempts to elude the polarisation between PT-ism and anti-PT-ism, and she is identified as responsible, ethical and not corrupt, attractive features for many voters.

Another centre-left candidate is Ciro Gomes of the Democratic Labour Party (PDT). In recent polls he clocked up 12% of the intended vote. Both a former Minister of National Integration and former Minister of Finance, Gomes is an intelligent and highly qualified candidate. However, he faces an obstacle in that his electoral fiefdom is the Brazilian North-East (where he was Governor of Ceará from 1991 to 1994) but where the PT also has the extraordinary capacity to weave political alliances that could leave him bereft of support.

Nevertheless, if the centre-left vote is essentially divided between the PT candidate and the former PT member Marina Silva, the same could occur with the centre-right, which is also in dispute. Public opinion believes that the PT has been the party to suffer the most from *Lava Jato*, but the PSDB has also been hit hard. The latter’s main leader, Aécio Neves—who came in second in the presidential elections of 2014—now has an open case against him at the Supreme Court on charges of passive corruption and
obstruction of justice. Meanwhile, the current Governor of São Paulo, Geraldo Alckmin (the ‘tucano’ candidate) has been unable to take off in the polls and continues at an anaemic 6%. A discrete man lacking charisma, Alckmin is also plagued by the shadow of corruption and therefore faces significant difficulties in this election. His strong point is that he represents the traditional and powerful electoral machinery of Brasilia and he enjoys the backing of the press. His alliance with the parties of the so-called centrão político (the political centre) allows him ample TV advertising time for election promotion. This is his major weapon, but his appalling position in the polls only one month before the beginning of the elections is a cause of concern for those who support him. While Alckmin has commercial blocks of political advertisements that run to five minutes and 32 seconds, the election ads of PT are two minutes and 23 seconds, those of Marina Silva only 21 seconds and those of Bolsonaro a mere eight seconds. In his ads, Alckmin has a serious mien and criticises the authoritarian demagoguery of Bolsonaro, his main competitor.

On the other hand, this will be the first time that the MDB fields its own candidate: Henrique Meirelles, the recent Minister of Finance, a former Chairman of the Bank of Boston and Chairman of the Central Bank from 2003 to 2010 during the Lula presidency. He is the representative of Temer’s government, which currently has an 80% rejection rate. His backing in the polls is only between 1% and 2%. All signs indicate that after the 2018 election, the MDB will return to where it has always been: in the shadows and backrooms of power, a position it comfortably occupies and from which it guarantees the governability of other parties—the PT, in the past, but perhaps now the PSDB, depending on which party emerges victorious—. The three major groups in the Congress are the PT (70 deputies), the MDB (66) and the PSDB (54). As is often said in Brazil: ‘No one governs without the support of the MDB’.

Therefore, the space left by the centre-right has been occupied by the far right. Jair Bolsonaro—a former army Captain and Federal Deputy for Rio de Janeiro since 1991—is now in second place with 19% of the intended vote, behind Lula. He is a typical far-right candidate: a braggart, demagogue and homophobe with simplistic and populist solutions for everything, but particularly in public security. His proposals include a reform of the penal code to toughen sentences, an increase in jailing rates, a reduction in the legal penal age from 18 to 16 years, the militarisation of schools and an iron hand all round. He tells his voters that these policies will resolve the security chaos in Brazil. He is also the candidate who best captures the anti-political sentiment of the slogan reigning in Brazil since Java Jato: ‘They all (the politicians) should leave’. Bolsonaro portrays himself as the only honourable candidate who has not been involved in any of the recent corruption scandals. Finally, he waves the flag of traditional values, articulating a discourse that prioritises law and order, and lauds authority, the family and the value of work and effort.

A paradox of Brazilian political life, Bolsonaro became the victim of his own discourse of hate when he was stabbed on 6 September during an election rally by a clearly deranged individual. Analysts agree that the attack will prove beneficial for his image because it legitimises his rhetoric of victimisation and further strengthens his already popular narrative of an unprotected citizenry and the overriding necessity to be tougher as regards public safety. However, analysts also coincide that while it will help Bolsonaro
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pass to the second round, he will probably lose in the end. In the last survey by the Brazilian Institute of Public Opinion and Statistics (IBOPE), undertaken on 1-3 September, Bolsonaro was projected to lose under all second-round scenarios –except against Haddad, with whom he would technically tie–. This explains why his rejection level is the highest of all candidates: 44% (followed at a distance by Marina Silva, at 26%).

According to an XP survey of 204 investors in June 2018, the market is most attracted to the candidacy of Alckmin. However, only 31% think he has any real chance of winning and 48% project a victory for Bolsonaro. Some 45% believe that the second round will be contested between Ciro Gomes and Bolsonaro. But a victory for the far-right candidate would not cause a market panic: 49% think that the São Paulo Stock Exchange index would rise if Bolsonaro wins.

Following traditional political science, it might be said that Bolsonaro himself has no real chance of winning the elections. The party to which he is affiliated (PSL) is very small and currently has only eight deputies, allowing him only the minimum eight-second TV ads and much less public finance for his campaign than the other parties. But this is not a traditional election. With 5.3 million followers on Facebook, he is clearly the candidate representing the negative vote, the rejection of the system, the politicisation of anti-politics and a vote of frustration and rage from an electorate that no longer trusts traditional parties or political figures. Bolsonaro is also the candidate most favoured by the anti-PT and anti-Lula discourse.

**Conclusions**

Everything about this election is atypical. Therefore, projections are complex. Within a scenario of uncertainty, however, some things have become clearer. If two years ago it was believed that the PT would be the great victim of Operação Lava Jato, perceptions have changed completely. No one expected an imprisoned Lula to have 39% support levels, showing that the PT is imposing its narrative, with a discourse of coup d’état and political imprisonment. It is very revealing that the PT is now the preferred party of 24% of Brazilians, far ahead of the MDB and PSDB (preferred by only 4% each). As they say in Brazil: ‘If Judge Sergio Moro did not finish off the PT, he might end up raising it to the Planalto’ (ie, the seat of the presidency of the Republic).

Many analysts believe that the presence of the PT in the second round is guaranteed thanks to the potential for Lula votes to shift to Haddad. But the most significant unknown, without a doubt, is the battle between the traditional centre-right (represented by Alckmin, with all the electoral and political machinery but very low popularity) and the new far right (represented by Bolsonaro, who lacks electoral and party machinery but is highly popular and seen as the heir to political despair and frustration). But should electoral machinery carry the day, there will once again be a classic second round with the PT facing off against the PSDB.

Beyond this struggle for electoral victory, Brazil urgently needs a stable government that takes on the root causes of the economic crisis engulfing the country and that enjoys enough support to undertake political reforms to make its representative system fairer
and democratic. Stability will not be easy to achieve in the face of current social polarisation, the imbalance between political forces and especially given the role that the MDB and the other parties of the centrão played in the impeachment of Dilma Rousseff. For the Brazilian middle class these factors do not imply a significant impact but for the country’s poorest the effects are devastating. For instance, the infant mortality rate has begun to rise again for the first time since 1990. So, while some politicise ‘anti-politics’ and others wield demagogic discourses or weave complicated political alliances in the backrooms, the most vulnerable citizens continue to pay the price.