



WEEKLY REPORT

B R A Z I L ' S I N T E R N A T I O N A L E N G A G E M E N T

SEP/ 21

Decoding Brazilian Foreign Policy

Dear readers,

Over the last week, Brazil's international insertion has combined economic diversification, competition for sensitive assets, and diplomatic repositioning, while there have been no relevant discussions in the National Congress on international issues. In the economic field, the country has expanded markets in Cuba, Mexico, South Korea, Africa, Russia, and EFTA, and sought to reduce vulnerabilities to tariffs, destination concentration, and external dependence. In this context, the trade surplus has remained high. Even so, its structural relevance depends on the added value of exports, industrial capacity, and control over profitable stages of global chains.

In addition, the highlight was the advancement of the critical minerals and rare earths agenda. The new policy introduced fiscal and regulatory instruments to stimulate domestic beneficiation, expand state oversight, and attract investment. In addition, rare earths, graphite, and nickel projects gained prominence. In this scenario, the pressure from the United States on the sale of nickel assets to a Chinese company shows that these resources are no longer just commodities and have become part of the dispute between powers. Therefore, the abundance of reserves is only the starting point. To convert this geological advantage into structural power, Brazil will need to advance in processing, master critical technologies, internalize knowledge, and expand its participation in the highest value stages of mineral chains. In this way, natural resources can be transformed into industrial capacity and economic and technological autonomy.

At the same time, this dispute was reflected in Brazilian diplomacy. In the BRICS, the country supported global governance reforms and a greater voice for emerging economies. With China, it deepened bilateral coordination, while the rapprochement between India and Mercosur reinforced efforts to diversify trade. At the same time, the resumption of tariff dialogue with the United States exposed the limits imposed by power asymmetries. Consequently, it became important to combine bilateral negotiation, diversification of partners, and the strengthening of multilateral institutions.

In view of this set, the week revealed tension between insertion and autonomy. Brazil expands markets, attracts capital, and participates in coalitions. However, converting these opportunities into structural power will depend on the mastery of technology, financing, infrastructure, and industrial processing. In this sense, autonomy does not result only from commercial expansion. It requires state capacity to coordinate investments, preserve sensitive assets, and transform external insertion into lasting productive, technological, and institutional development.

AI tools were used in the preparation of this report. All content was reviewed by humans.

Economy, Trade and Investment

New markets in Cuba and Mexico

Cuba and Mexico have approved new sanitary requirements for Brazilian products. The Cuban market has started to accept fresh apples, grapes, pears and oranges from Brazil. At the same time, Mexico has authorized non-hydrolyzed beef proteins, including collagen. According to the Ministry of Agriculture, the openings expand commercial opportunities for Brazilian agribusiness and result from sanitary negotiations between the authorities of the countries directly involved.

Why is this important? Authorizations expand access to markets and diversify trade flows. Thus, they strengthen Brazil's capacity to convert agricultural production into structural influence in the contemporary world-system.

Brazil adapts subsidies to fishing

A workshop in Brasilia assessed Brazil's compliance with the World Trade Organization's Agreement on Fisheries Subsidies. Experts discussed international rules, illegal, unreported, and unregulated fishing, stock status, and modalities for public support. The meeting also presented a preliminary matrix of subsidies. It examined national credit and financing instruments for the Brazilian fishing sector.

Why is this important? Compliance with multilateral rules conditions national support policies. In this way, global institutions influence competitiveness, regulatory autonomy, and the distribution of power in the contemporary world-system.

Brazil expands fishing dialogue with Morocco

Brazil and Morocco held a business seminar in Casablanca focused on trade, investments, and partnerships in fisheries and aquaculture. The Brazilian government presented the national productive capacity, highlighted opportunities for higher-value products, and sought to expand exports. The meeting also highlighted Morocco's position as a potential strategic platform for access to expanding markets in Africa and Europe.

Why is this important? The rapprochement diversifies markets and strengthens South-South connections. Thus, Brazil expands trade channels and reduces dependencies concentrated in the global economic hierarchy of the contemporary world-system.

Economy, Trade and Investment

Brazil fights trade irregularities

The MDIC released a report on the fight against irregularities in [foreign trade](#) for the period January to July 2026. The document records forty-three complaints analyzed by the Foreign Trade Intelligence Group, mainly involving suspicions of under-invoicing and incorrect tax classification. The initiative seeks to strengthen inspection, customs compliance, and institutional coordination to address practices that could harm Brazilian trade.

Why is this important? Trade oversight protects revenue and competition. In addition, it strengthens the ability to control transnational flows, a central resource of structural power in the contemporary world economy.

Trade surplus reaches US\$ 58.67 billion

In the second week of September 2026, Brazil recorded exports of US\$14.247 billion and imports of US\$10.891 billion, resulting in a surplus of US\$3.356 billion. In the year up to this period, foreign sales totaled US\$ 265.10 billion, against US\$ 206.43 billion in purchases, producing a surplus of US\$ 58.67 billion and a total [trade flow](#) of US\$ 471.53 billion.

Why is this important? The surplus increases external availability and economic margin. However, its structural relevance depends on the export composition, added value and positions in global chains.

Market reduces deficit projection

The [Fiscal Prism](#) showed an improvement in market expectations for the Central Government's accounts. The median projected primary deficit for 2026 fell from R\$59.145 billion to R\$52.271 billion, while the 2027 projection fell to R\$45.35 billion. For 2026, federal revenues were estimated at R\$3.202 trillion, and gross debt was estimated at 83.2% of national GDP.

Why is this important? Fiscal expectations affect financing, investment, and state capacity. Therefore, they condition Brazilian autonomy in the face of financial markets and the hierarchies that structure the world economy.

Economy, Trade and Investment

Brazil seeks to expand proteins in Korea

In [Seoul](#), ABPA, ApexBrasil, and the Brazilian Embassy promoted dialogue on animal protein trade and food security between Brazil and South Korea. The meeting highlighted Brazil's condition as a foot-and-mouth disease-free country without vaccination and discussed access for pork. It also presented the recent growth of Brazilian chicken and pork exports to the important South Korean market.

Why is this important? Food security creates strategic interdependence. Thus, by expanding markets for proteins, Brazil transforms production capacity into commercial access, influence, and insertion in global chains.

ApexBrasil and CNI expand internationalization

ApexBrasil and CNI signed an [agreement](#) for R\$ 7.103 million, with a 12-month duration, to support about 400 companies across 8 international actions. The initiatives cover Latin America and the Caribbean, Europe, Asia and Africa, with a focus on market diversification, the bioeconomy, sustainable industry, digital transformation, and greater female participation, in response to new external trade barriers.

Why is this important? Diversification reduces vulnerability to tariff shocks and concentrated markets. In addition, support for internationalization seeks to reposition companies in segments of value and power.

Brazilian quartzites gain space in Italy

Brazil is preparing to participate in Marmomac 2026, in Verona, seeking to consolidate its quartzites in the [Italian market](#), which has already received more than US\$ 85 million in Brazilian exports. For the second year, a pavilion will be dedicated to the country, bringing together 42 companies, 32 of which are in the It's Natural space, organized by Centrorochas and ApexBrasil to promote stones internationally.

Why is this important? Promoting quartzites with an identity of origin seeks to overcome extractive insertion. Thus, it adds brand, differentiation, and value, elements to improve the Brazilian position in global chains.

Economy, Trade and Investment

Brazil brings companies closer to African buyers

In Salvador, the [Exporta Mais Brasil](#) program brought together about 30 Brazilian companies and 10 buyers from African countries, including South Africa, Kenya, Mozambique, Nigeria, and Tunisia. The business round focused on cosmetics, food and beverages, bringing exporters closer to specific demands of African markets. The initiative is part of a strategy by ApexBrasil and Itamaraty to diversify commercial destinations.

Why is this important? The expansion into African markets broadens South-South connections and reduces export concentration. In this way, it strengthens Brazilian trade alternatives within a hierarchical world economy.

Brazil strengthens its presence in the Russian market

Brazil participated in [WorldFood Moscow 2026](#), held from September 15 to 18, with a business presence focused on promoting food and beverages. The initiative sought to expand business and trade connections and access to the Russian and Eurasian markets. The Brazilian pavilion presented national brands, products, and ingredients, with ApexBrasil's support for the internationalization and diversification of Brazilian exports.

Why is this important? Presence in Eurasian markets expands commercial options in a fragmented environment. Thus, it reduces dependencies and strengthens the ability to move goods between poles of the world-system.

ApexBrasil responds to U.S. tariffs

ApexBrasil launched the [More Fairs](#) – North and Central America program to support exporting companies affected by recent tariffs from the United States. The initiative offers up to US\$8,000 per company to participate in fairs in Canada, Mexico, Central America, the Caribbean, and the Bahamas. The objective is to seek buyers, diversify destinations, and reduce impacts associated with the new trade barriers.

Why is this important? The program responds to tariff asymmetry by diversifying markets. In this way, it reduces exposure to decisions about power and expands Brazilian commercial autonomy in the current international economy.

Economy, Trade and Investment

Brazil aims for greater added value in EFTA

A study by ApexBrasil identified 653 commercial opportunities for Brazilian products in the [EFTA countries](#): Switzerland, Norway, Iceland and Liechtenstein. Among the segments are aircraft, medical equipment, precision instruments, machinery and food. As 73.1% of Brazilian exports to the bloc in 2025 were concentrated in non-monetary gold and alumina, the survey emphasizes the concrete potential to diversify sales toward higher-value products.

Why is this important? Migrating from primary-goods exports to technological and industrial products can increase value capture. Thus, it reduces peripheral positions in the chains of the contemporary world-system.

Selic rate fell to 13.75%

The Copom reduced the [Selic rate](#) from 14% to 13.75% per year, the fifth consecutive drop, by unanimous decision. The movement occurred after a deceleration in prices, with deflation of 0.32% in August and cumulative inflation of 4.22% over 12 months. The Central Bank indicated that further cuts will depend on economic data, while remaining attentive to existing fiscal, external, and climatic risks.

Why is this important? Lower interest rates can increase credit, investment, and growth. However, monetary autonomy remains conditioned by inflation, financial flows, and external shocks produced in the contemporary world-system.

Renault and Geely expand investments

[Renault and Geely](#) announced a joint investment of 319 million euros in Brazil, reinforcing their industrial partnership. The Reuters note, published on September 15, informs the amount and the general objective of deepening this cooperation in the country. The text does not detail specific projects, the disbursement schedule, the units benefiting, or the expected distribution of resources.

Why is this important? The investment shows how capital, technology, and automotive production circulate through networks. Thus, Brazil competes for industrial capacity, qualified jobs, and productive autonomy in the world-system.

Energy and Infrastructure

Brazil advances in South American integration

The Interministerial Commission for [Infrastructure and Integration Planning](#) in South America held its first ordinary meeting. The collegiate discussed the South American Integration Routes program and approved proposals for resolutions, including an action plan for 2026 and 2027. The document brings together fifteen objectives, forty-nine deliverables, and nineteen executing agencies, articulating infrastructure and regional planning.

Why is this important? Planning regional infrastructure can reorganize trade, logistics, and financing flows. Thus, it expands South American connections and the Brazilian capacity to influence strategic networks of the world-system.

Brazil debates road safety

The Ministry of Transport promoted the fifth International [Seminar on Traffic Safety](#) in Brasilia, bringing together Brazilian and foreign experts. The event marked the start of National Traffic Week and presented experiences in accident investigation and prevention. Among the highlights was the CNEST, created in 2026 to study serious occurrences and prevent recurrences, inspired by the aviation investigation model.

Why is this important? Secure infrastructure reduces costs and improves state capacities. In addition, logistical efficiency conditions competitiveness, territorial connectivity, and power over international flows in the contemporary global world-system.

Government seeks to reactivate idle railroads

The Ministry of Transport presented, at [B3](#), a portfolio aimed at reactivating idle railroads and implementing logistics terminals. The proposal seeks to return underutilized stretches to economic activity through contracting and investment models. The government associates the initiative with the expansion of the network, the increase in logistics capacity, and the integration of national transport corridors.

Why is this important? Railroads and terminals shape costs, routes, and access to markets. Therefore, expanding infrastructure strengthens control over internal and external flows, a component of national structural power.

Energy and Infrastructure

Diesel exposes Brazil's external dependence

The rise in international diesel prices has widened the difference between imported fuel and the price charged by [Petrobras](#), making foreign purchases difficult. Importers have begun to postpone operations, while domestic production operates close to capacity. Brazil relies on imports to meet a portion of its consumption, although the ANP has reported no risk of shortages in Rio Grande do Sul.

Why is this important? Reliance on imported diesel exposes the country to global price and logistics risks. Thus, it shows how energy security conditions economic autonomy and Brazilian structural power.

Technology and Defense

Brazil strengthens border governance

The [National Border Committee](#) held its fifth ordinary meeting, coordinated by the Institutional Security Cabinet, with the participation of forty federal agencies. The meeting followed the National Border Policy, dealt with the elaboration of the National Strategy and the corresponding plan, and discussed security, sustainable development, regional integration, human rights, social protection, and initiatives in Brazilian land and maritime border areas.

Why is this important? Governing borders combines security, circulation, and integration. Thus, this state capacity defines who controls territorial flows and transforms space into a resource of national structural power.

Brazil tests reusable space laboratory

A [space laboratory](#) with experiments supported by the MCTI underwent flight tests in Paraíba. The mission evaluated the Suborbital Microgravity Platform with Recovery, a reusable platform for microgravity research. Among the payloads were experiments with microorganisms linked to plant growth. The data from Operation Potiguar will be used to evaluate the system and develop space scientific research.

Why is this important? Space capacity reduces technological dependence and expands domain over knowledge, infrastructure, and innovation. In this way, it strengthens resources that influence central and peripheral positions in the world-system.

Technology and Defense

Redata stimulates digital infrastructure

The government sanctioned [Redata](#), a regime aimed at stimulating data centers and associated technological chains in Brazil. The policy grants tax benefits for information technology equipment and conditions access to investments in research, serving the domestic market and environmental criteria. The program also seeks to decentralize projects regionally and support cloud services, artificial intelligence, and the digital industry.

Why is this important? Data centers concentrate the infrastructure of the digital economy. Thus, internalizing computing capacity can reduce external dependence and expand sovereignty over data, innovation, and strategic artificial intelligence.

Tax incentives boost data centers

The [Special Taxation Regime for Data Center Services](#) was sanctioned to encourage the installation and expansion of this infrastructure in the country. Redata covers processing, storage, cloud, high-performance computing, and artificial intelligence. Beneficiary companies commit to investing in research, serving the Brazilian market, using clean or renewable energy, and meeting minimum standards for water and environmental efficiency.

Why is this important? Tax incentives seek to attract digital infrastructure. However, their structural effect depends on converting data centers into knowledge, domestic technological capacity, and control over critical services.

Law consolidates a Redata

Law 15,504, of September 15, 2026, instituted [Redata](#) by amending the Good Law and other federal rules. The regime grants favorable tax treatment to the acquisition and import of goods intended for data center services, establishing requirements, counterparts, and commitments for beneficiaries. The law includes provisions regarding the Digital Statute of the Child and Adolescent.

Why is this important? Reducing computational infrastructure costs can attract capital and digital capacity. But structural gains depend on how much knowledge, technology, and control will remain in the country.

Technology and Defense

Renewables challenge data center expansion

Axia stated that [data centers](#) can operate with a high share of renewable energy, as long as the project architecture ensures a reliable, continuous supply. The discussion takes place after Redata admits low-emission energy, in addition to renewables, with criteria dependent on regulation. The company highlighted network planning, location, generation expansion, and economic signals for large loads.

Why is this important? The energy that sustains data centers connects power and electrical infrastructure. Thus, mastering this articulation allows for investments without deepening technological, energy, or territorial dependencies.

Critical Minerals and Rare Earths

Brazil creates critical minerals policy

The president sanctioned the [National Policy on Critical and Strategic Minerals](#), aimed at organizing public actions to research, extract, process, transform, and recycle these resources. The policy seeks to add value to the country, stimulate innovation, energy, and technological security, and advance sustainability and regional development. It also creates a coordination body and provides for financial, tax, and regulatory instruments associated with productive and environmental counterparts.

Why is this important? Critical minerals confer influence when reserves are converted into processing, technology, and industry. Thus, the policy seeks to shift Brazil to positions in strategic chains.

New law expands control over minerals

The [National Policy on Critical and Strategic Minerals](#) established instruments to encourage domestic processing and expand state oversight of assets deemed strategic. The legislation provides for an interministerial council, tax incentives of up to R\$ 5 billion between 2030 and 2034, and financial mechanisms. Certain changes in control, transfers of mining rights, and international operations may depend on government analysis according to future regulations.

Why is this important? The law expands instruments to transform reserves into capacity and control assets. Thus, it strengthens the position in the dispute for technology, economic security, and structural power.

Critical Minerals and Rare Earths

Eco Invest directs R\$ 7 billion to minerals

The [Eco Invest Brasil](#) program allocated R\$ 7 billion to finance the critical minerals chain, seeking to mobilize private capital and encourage higher value-added stages. The article highlights large Brazilian reserves of rare earths but still-limited production. It identifies bottlenecks in the separation, refining, and manufacture of magnets. The objective is to reduce external dependence and expand mineral industrialization.

Why is this important? Financing processing seeks to prevent Brazil from remaining a supplier of raw materials. Thus, it strengthens control over technological and profitable stages, a condition for expanding national structural power.

U.S. puts pressure on Brazil over nickel assets

According to reports cited by the publication, the [United States](#) has asked the Brazilian government to review the sale of Anglo American's nickel assets to China's MMG. U.S. officials have also reportedly advocated greater scrutiny of acquisitions of strategic minerals by economies considered non-market. Brazilian sources, however, have indicated a rejection of discriminatory treatment and an advocacy of equivalent rules for foreign investors.

Why is this important? The dispute highlights critical minerals as geopolitical assets. Thus, controlling ownership, investment, and access to resources alters dependencies between powers and the Brazilian strategic margin.

Colossus advances on rare earths

Sedgman has been chosen as the preferred contractor for engineering, procurement and construction management for [Viridis' Colossus project](#) in Minas Gerais. Work begins with detailed engineering and procurement before the final investment decision, and may proceed to execution and commissioning. The project explores rare-earth-ion-adsorbing clays in the Poços de Caldas region.

Why is this important? Rare earth projects expand supply outside the dominant centers. However, their structural power will depend on how much processing, engineering, knowledge, and value remain in Brazil.

Critical Minerals and Rare Earths

Graffiti from Santa Cruz resumes production

South Star Battery Metals resumed operations at the Santa Cruz graphite project in Bahia after financial difficulties in 2025. The company claims to have reduced operating costs and aims to reach 5,000 tons per year by the end of 2026, then advance to 10,000 tons per year. Further expansion will depend on new studies, while the company seeks buyers and international commercial agreements.

Why is this important? Graphite is a strategic input for batteries. Thus, expanding production diversifies supply, but autonomy depends on mastering processing, contracts, technology and access to value markets.

State expands instruments on minerals

The sanction of the National Policy on Critical and Strategic Minerals created tax incentives, financial mechanisms, and greater government capacity to monitor operations involving assets considered strategic. The law provides for up to R\$ 5 billion in tax credits between 2030 and 2034, as well as instruments to stimulate processing. It also establishes an interministerial body and priorities for value addition and national production chains.

Why is this important? Mineral reserves gain geopolitical relevance when the State influences ownership, financing, and processing. Thus, these instruments seek to increase value and decision-making capacity in Brazil.

Human Rights

Brazil monitors the case of the fireworks factory

The Ministry of Human Rights participated in Salvador in a meeting to monitor measures related to the case of the Santo Antônio de Jesus fireworks factory, which is before the Inter-American Court of Human Rights. Representatives, universities, victims, and organizations monitored actions in socioeconomic development, education, health, social protection, culture, and the prevention of child labor, as well as inspected the production of fireworks.

Why is this important? The case shows how human rights norms can constrain state omissions. Thus, they redistribute authority among victims, national institutions, and supranational mechanisms of political accountability.

International Cooperation

Coalition advances in carbon markets

The [Open Coalition on Carbon Markets](#) held its second high-level meeting in Wuhan. It approved a work plan through 2030 and a provisional secretariat structure. Brazil, China, and the European Union play leadership roles. The initiative brings together countries and the economic bloc to promote dialogue, technical cooperation, and greater alignment between regulated carbon pricing systems.

Why is this important? Convergence of carbon markets defines standards, costs, and access. Thus, participating in governance allows Brazil to influence rules that distribute power in the climate transition.

Environment and Sustainability

Amazon measures impacts of El Niño

Researchers from the Amazon High Tower Observatory monitor the effects of [El Niño](#) on preserved primary forest. The monitoring considers precipitation, air temperature and humidity, and soil temperature and moisture. The 325-meter tower enables observation of ecosystem responses, and the data indicate additional pressure from the climate phenomenon on the forest over a short period.

Why is this important? Monitoring the Amazon generates knowledge about climate and carbon. Thus, it expands resources that influence environmental negotiations, international funding, and scientific authority in the governance of the world-system.

Brazil deepens cooperation on carbon

Brazil presented its Brazilian Emissions Trading System at the [China Carbon Market Conference](#) in Wuhan, in front of authorities. The agenda included bilateral meetings with China, Indonesia and South Korea. With Beijing, there was a discussion on cooperation in carbon markets and preparation of a memorandum, as well as mutual support for the Open Coalition on Carbon Markets.

Why is this important? Carbon markets convert regulation into economic value. Thus, influencing standards allows us to dispute who sets prices, certifications, and financial flows in the global carbon transition.

Environment and Sustainability

Civil society will be part of the COP31 delegation

The Ministry of Racial Equality has opened registration for representatives of civil society to join the Brazilian delegation at [COP31](#), in Antalya, Turkey. The call includes black organizations, quilombolas, gypsy peoples, traditional communities of African origin, and terreiros. Those selected will have access to the Blue Zone of the conference, which seeks to expand diversity, participation, and the presence of affected groups in climate debates.

Why is this important? Expanding representation in climate diplomacy challenges the concentration of voice and authority. Thus, it inserts marginalized groups into the dispute over resources, recognition, and the definition of global priorities.

Brazil articulates clean air plan

The Ministry of the Environment presented, at an international meeting in Brasília, a study for the [National Plan for Clean Air and Climate](#) and discussed regional governance with Mexico and Uruguay. The work addresses short-lived climate pollutants, such as methane, black carbon, and hydrofluorocarbons, and articulates the health and climate connections. The draft of the plan was submitted for consultation to improve goals and governance.

Why is this important? Cooperation on pollutants strengthens the ability to formulate standards and negotiate responsibilities. Thus, it reduces asymmetries in climate governance, which are marked by unequal resources, technology, and financing.

Brazil and Italy bring energy transition closer

[Brasil e Itália](#) ampliaram diálogo sobre investimentos na transição energética durante mesa-redonda em Brasília. Representantes públicos e privados discutiram tecnologias, soluções, ambiente regulatório, financiamento e oportunidades de negócios ligadas à descarbonização. O encontro marcou a iniciativa Brazil–Italy Partners for Energy Transition, voltada a aproximar empresas e instituições dos dois países e estimular projetos e investimentos em energia de baixo carbono.

Why is this important? The energy transition redistributes capital, technology, and infrastructure. Thus, attracting investments with capacity transfer expands Brazilian autonomy, while financial dependence preserves world-system hierarchies.

Environment and Sustainability

Google expands carbon removal in Rio Grande do Sul

Google has signed its largest carbon removal agreement with Terradot, covering more than 200,000 hectares in Rio Grande do Sul. The project combines accelerated rock weathering to remove carbon dioxide with methane reduction in rice cultivation. The company intends to test a model that combines carbon removal and reduction of agricultural emissions.

Why is this important? Removal projects turn territory and carbon into assets. Thus, structural power depends on who controls technology, certification, data, financing, and the capture of climate value.

Diplomacy

BRICS advocates reform of global governance

The BRICS leaders meeting in New Delhi approved a declaration that reaffirms cooperation in the political and security, economic and financial, and cultural pillars. The document advocates global governance reform, strengthening multilateralism and the role of the WTO, and addressing sustainable development, technology, international security, and unilateral trade measures. It also reinforces coordination among members amid contemporary international transformations.

Why is this important? The declaration seeks to amplify the voice of emerging economies in global governance. Thus, it challenges concentrations of normative, financial, and institutional authority in the contemporary world-system.

China and Brazil strengthen strategic coordination

Wang Yi received Celso Amorim in Beijing on September 16 to discuss the strategic relationship between China and Brazil. According to the note, both reaffirmed the implementation of the understandings reached by the presidents, deepening practical cooperation and coordination on international and regional issues. The meeting reiterated the need to build a community with a shared future and to pursue joint sustainable development goals.

Why is this important? Sino-Brazilian coordination expands diplomatic and economic alternatives. However, it places Brazil in the competition between poles, requiring the ability to preserve decision-making autonomy in the face of such pressures.

Diplomacy

India and Mercosur expand trade negotiations

India and Mercosur have launched negotiations to expand the Preferential Trade Agreement. Indian Minister Piyush Goyal and Uruguayan Foreign Minister Mario Lubetkin, representing the bloc's temporary presidency, announced the initiative. The parties intend to expand areas of mutual interest, deepen economic relations and create opportunities for the private sector, while working on terms of reference that will define scope and structure.

Why is this important? Expanding the agreement diversifies partners and reduces concentration. Thus, it strengthens South-South connections and the ability of Mercosur and India to negotiate space before the dominant poles of the world-system.

Brazil and the US resume tariff dialogue

Brazil and the United States were preparing a new round of face-to-face talks on tariffs during the G20 ministerial meeting, scheduled for September 30 and October 1. The agenda would follow the resumption of bilateral dialogue and address U.S. surcharges on Brazilian products. The Brazilian government criticized the unilateral measures and defended negotiation, trade openness, and multilateral mechanisms to manage economic divergences.

Why is this important? Negotiating tariffs with a central power reveals power asymmetry. Thus, diversification and multilateral institutions can expand Brazil's margin in the face of adverse external unilateral decisions.

Redata integrates digital economic diplomacy

The sanction of Law 15,504 on September 15 reestablished the ReData regime to reduce the federal tax burden on data center investments. The proposal had emerged as a provisional measure, lost its validity, and was then reintroduced as a bill approved by Congress. The rule aims to stimulate the adoption of digital infrastructure in Brazil through tax incentives and specific requirements.

Why is this important? Diplomacy for digital investments depends on competitive rules. Thus, attracting data centers can expand technological capacity, although ownership and control define the structural gains.

Over the past few weeks, Brazil's position in the world-system has been strained by three vectors: the Sino-American dispute over technology, assets, and production chains, energy instability in the Middle East, and the politicization of the economic relationship with Washington. In this context, critical minerals have gained relevance because they connect defense, energy transition, digital industry, and economic security. The policy expands financing, processing, and supervision as the United States, China, and the European Union compete for access to nickel, rare earths, and other decisive inputs.

This pressure became concrete with the resumption of trade negotiations between Brazil and the United States on tariffs. However, the problem goes beyond the tariff dimension. Previous proposals from Washington combined trade and regulatory requirements with demands on critical minerals and conditions related to the 2026 Brazilian presidential election. Although these electoral clauses were removed from the later version, there were continued calls to limit foreign investment, review the sale of Anglo American's nickel assets to China's MMG, and expand opportunities for U.S. companies. Thus, trade began to function as an instrument of pressure on domestic decisions and on Brazil's insertion in Sino-American competition.

The risk, therefore, is that Brazil will be valued as a supplier of resources and a consumer market, without converting this position into technological and industrial capacity. In this sense, owning critical minerals does not guarantee autonomy. If decisions on processing, financing, technology, and ownership remain concentrated abroad, the geological advantage may reproduce historical dependencies rather than alter Brazil's position in the global economic hierarchy.

At the same time, deteriorating security in the Strait of Hormuz and the Bab el-Mandeb reinforces this vulnerability. Traffic through Hormuz remains below average, while the Houthi advance puts pressure on maritime routes, oil, insurance, and freight. For Brazil, this increases logistical and inflationary costs as the economy seeks to preserve surpluses, reduce interest rates, and diversify markets.

In this scenario, diplomacy ceases to be an instrument of projection and starts to defend decision-making margin. The UN General Assembly's High-Level Week and the High-level Event on Climate Action and the Just Transition, on September 23, offer space to articulate climate, development, and energy security. The Brazilian challenge will be to prevent diplomatic diversification from hiding new dependencies. In terms of structural power, autonomy requires controlling technology, adding value to resources, and preserving the ability to choose in the face of Washington and Beijing.



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