How Brazil embraced informal organizations

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Abstract
Brazil’s foreign policy strategy traditionally focused on formal international organizations and ways to strengthen its role in them, symbolized by efforts to become a permanent UN Security Council member, and by accelerating voting reform in the Bretton Woods institutions. These goals were underpinned by a notion that the institutions that are at the heart of post-WWI order, while not providing emerging powers with the space and responsibilities that they deserved, still represented the ideal platforms for Brazil to defend its national interests. Yet despite some progress in gaining greater visibility, its overall experience over the past two decades has been frustrating, a dynamic that is crucial to understand Brazil’s turn to informal organizations such as BRICS and the G20, which became the pillars of its foreign policy strategy in the 2000s. Indeed, the country’s emphasis on informal structures remained even after a center-left government supportive of multilateralism has been replaced by a right-wing president who supports "anti-globalism" and who frequently criticizes the United Nations. This article explores Brazil’s transition and the tensions that it has created between formal organizations—both globally or regionally—with the contagion dynamics of informality. It then discusses implications for global governance.

Keywords Brazil · Informal organizations · G20 · BRICS

This article seeks to analyze Brazil’s transition from a country that strongly favored formal international organizations to one that has been heavily engaged in informal outfits such as BRICS and the G20. The first part of the article will assess the origins and reasons of Brazil’s multilateral convictions, traditionally supported by foreign policy thinkers across the ideological spectrum. The first part of the article also assesses how Brazil’s engagement with international institutions has been treated by the mainstream IR literature. Part two will assess a key element of Brazil’s
experience with multilateral institutions: foreign policy makers’ frustration with Western countries’ unwillingness to share power in earnest and the perception that “gentleman agreements” about the World Bank and IMF leadership positions show that the system was rigged against developing countries. Part three describes how this experience explains Brazilian diplomacy’s strong emphasis on informals after the year 2000, which provided the country with the international status it believed it deserved. Part four contextualizes the case of Brazil in the current debate about informal organizations and offers four main lessons that it offers to advance the discussion.

The roots of Brazil’s multilateralism

As a large yet vulnerable developing country concerned about outside interference, Brazil has traditionally regarded a rules-based international order with strong multilateral institutions as its best option to protect its national interests and its sovereignty (de Lima and Hirst, 2006). Indeed, Brazil’s decades-long campaign to become a permanent UN Security Council member, at times described as an example of its revisionist ambitions by Western observers, has been the exact opposite: a conviction that formal international institutions were weak countries’ best bet and deserved to be strengthened (Stewart 2010). This tradition precedes the existence of today’s institutions, and Brazil, along with other Latin American countries, defended treaty-based multilateral cooperation as early as 1907 at the Second Hague Conference, whereas Western nations defended great power primacy (da Silva 2016). As Marcos Tourinho writes,

On one side, great powers sought to establish, in the classic European form, a system of differentiated prerogatives on the basis of their size and power. On the other, a group of Latin American states led by [the Brazilian diplomat] Ruy Barbosa insisted that international governance arrangements had to be necessarily founded on a regime strictly based on the sovereign equality of all states. Largely because of this dissent, the compulsory international court of justice failed to materialise—but at that point it became clear that international society was not exactly playing by European rules (Tourinho 2015).

At the 1919 Peace Conference, Brazil again sought to engage, and Senator Epitacioc Pessoa, who led the country’s delegation in Paris, was a member of the committee in charge of drafting the Covenant of the League of Nations (Lafer 2000). With Woodrow Wilson’s support, the country became a temporary member of the Executive Council of the new organization, along with Belgium, Greece and Spain (Garcia and Coelho 2018). When the United States Congress decided to reject the Versailles Treaty and the United States’ participation in the League of Nations, Brazil became the only country of the Americas on the Council. Soon later, Brazilian diplomats began to work toward obtaining a permanent seat, along with Britain, France, Italy and Japan. This strategy failed in a dramatic fashion, involving Brazil vetoing Germany’s entry into the League of Nations as a permanent member and causing a
temporary diplomatic crisis, before the country withdrew in 1926, disillusioned by European countries’ desire to control the institution (Leuchars 2001).

Brazil’s pro-multilateral policies at the time routinely clashed with those of powerful Western countries. In the following decades, individuals like Lloyd George, Woodrow Wilson and Winston Churchill, generally seen as key figures in the construction of global order after the World Wars, were in fact opponents of self-determination in the Global South, either based on their convictions of white racial superiority, or pragmatic consideration to maintain their imperial structures. Describing Churchill’s reluctance to accept the legitimacy of anti-colonial movements, Mark Mazower writes,

Churchill […] urged not merely aerial bombing but the use of mustard gas against ‘uncivilised tribes’ in India and Mesopotamia […] Meanwhile, what was euphemistically known as ‘air control’ remained the chief operational means of holding down large areas of the Middle East (Mazower 2008).

Great Britain’s decision to allow Iraq to become an independent country in 1932 was by no means based on noble principles of self-determination, but rather because policy makers in London believed a weak and newly independent kingdom would be easier to control than a restive mandate. Elsewhere, colonial rule broke down because it became politically and economically unsustainable, not because of a teleological process or predetermined, benevolent scheme. Britain’s retreat from India was a strategic choice to focus on reestablishing its empire in South-East Asia. For policy makers in London and Paris, colonies were seen as essential in helping finance the reconstruction of their infrastructure destroyed by World War II, after troops from those very colonies had helped them avoid defeat against the Axis Powers (Stuenkel 2015a, b). It was, in short, non-Western activists and policy makers from around the world, many of which hailed from the Global South, who transformed self-determination from a principle into a right—and international rules and norms as well as international institutions would be crucial to uphold these principles against the former colonial powers.

While Brazil, independent since the early nineteenth century, took no leading role in the anti-colonial struggle, and maintained close diplomatic ties to Lisbon, foreign policy makers in Rio de Janeiro (then Brazil’s capital) understood that the continuation of colonialism would make the implementation of universal rules about sovereignty more difficult, thus reducing their usefulness to defend its own territorial integrity from outside threats (Weis 2001). The success of anti-colonial leaders created one global normative system, overcoming the obstacles created by Western-centric international law, and reinterpreting the UN Charter, which had been designed at a time when the imperialist powers’ goal was to maintain the colonial system and white rule. When the anti-colonial movements used the UN as their major platform, Europe’s imperial leaders criticized the institution. Charles de Gaulle called UN meetings “no more than riotous and scandalous sessions where there is no way to organize an objective debate and which are filled with invectives and insults” (Stuenkel 2015a, b).
This situation fed into historic concerns by non-Western powers such as Brazil about the two faces of liberal nationalism: internationalist when turned toward the West, and imperial at the expense of the non-West, a contradiction that would still be highly influential after World War I, when Woodrow Wilson’s liberal discourse did not apply to non-European peoples seeking freedom, and in 1945, when the UN’s liberal rhetoric did not apply to French and British colonies. Wilson, a symbol of liberal thought in the twentieth century and today embraced as a visionary foreign policy maker, notoriously proclaimed that he would “teach the South American republics to elect good men”, a comment long forgotten by mainstream IR literature but which is still frequently evoked by Latin American IR scholars (McPherson 2019). It is this ambiguity and moral incoherence that has been liberalism’s main Achilles heel, seen from the perspective in the Global South, where the rhetoric of liberal internationalism is still often seen as a fig leaf for great powers promoting their national interest.

Brazil’s long road to frustration

Brazil’s desire to play a greater role in multilateral settings continued unabated after the debacle experienced at the League of Nations. The rationale behind the country’s multilateral strategy remained essentially the same: given Brazil’s very limited hard power and vulnerability, operating in an international system based on rules and norms would be preferable to a Hobbesian world where might is right. The consensus about the importance of strengthening international institutions to protect Brazil’s interests was so solid that throughout the twentieth century, Brazilian presidents only rarely directly engaged on foreign policy matters. Itamaraty, the Foreign Ministry, was so shielded from domestic politics that even institutional ruptures such as military coups in 1937 and 1964 did not fundamentally alter the country’s strategy vis-à-vis international institutions (Casey and Power, 2009). Even despite periods of high economic growth, such as from 1969 to 1972, the Brazilian government spent only limited amounts on defense, at no point altering the perception in Brasília that the country was, due to its many structural weaknesses, vulnerable and at risk of outside interference (Spektor 2010a, b).

When a first draft of the UN Charter was circulated among the Allies for comments in 1944, Brazil’s president Getulio Vargas asked the Foreign Ministry to request a permanent seat in bilateral talks with the Roosevelt administration. Even though Brazil was poor and had played only a very limited role in World War II, the president’s reivindicacion came naturally, and Brazilian diplomats often pointed to the country’s reliable diplomatic track-record, its economic potential, and the necessity to have a Latin American country in the UN Security Council (Garcia 2011). In addition, they argued, Brazil deserved the seat more than anyone considering that its demands in the League of Nations had been frustrated. “Let us not belittle the deep disappointment that the Brazilian people would feel if they are not recognized for their sacrifices in favor of the Allied forces,” Brazil’s negotiator wrote to his US counterpart (Garcia and Coelho 2018). Yet, the 1945 San Francisco Conference did not alter the UN Security Council structure that had been agreed upon in Dumbarton
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Oaks, excluding a permanent seat for Latin America or Brazil. But frustrations did not end there. Brazil’s expectations to regain some kind of reward for its material and military support for the Allies in World War were not fulfilled. While the United States provided lavish support to European allies via the Marshall Plan, aid to Brazil was small by comparison, strengthening the perception that the country had been cheated. While Roosevelt had been sympathetic to Brazil’s interests, Truman and Eisenhower prioritized support to regions deemed as crucial in the standoff with the Soviet Union. It would take more than a decade until Brazil’s President Juscelino Kubitschek was able to rally the region to obtain more development aid from the United States—a rare example of regional cooperation at a time when ties between Brazil and its neighbors were still incipient, as (it took another three decades before Brazil’s President Figueiredo would become the country’s first head of state to visit Colombia and Peru) (Long 2017). Still, president Kennedy’s Alliance for Progress was seen as little more than a consolation prize.

Yet more importantly, from Brazil’s perspective, the experiences described above were only part of a broader notion that the so-called US-led liberal international order existed in principle, but in practice applied to Western Europe and a few allies around the world such as Japan, Australia and Israel, while much of the developing world was exposed to a very different reality. In Latin America, this involved the US-sponsored overthrow of democratically elected governments—such as in Chile in the 1960s, the active US military involvement in Central American Republics or, most recently under the Trump administration, debates about a possible US military intervention in Venezuela, which forced even US allies such as Colombia and Brazil to side with Venezuela’s dictator Nicolás Maduro, whom neither of the two recognized as president. Seen from Bogotá and Brasília, the precedent a US military engagement in Venezuela would set was far more dangerous than Maduro’s continued rule in neighboring Venezuela, with which both shared a border of thousands of kilometers. Even under Obama, a US president seen in relatively favorable terms by the Brazilian public, the bilateral relationship experienced a profound crisis when it emerged that the United States’ National Security Agency had spied on both president Rousseff’s personal cell phone and, in what caused particular outrage in Brazil, on the state-owned oil firm Petrobras. When the details emerged, Rousseff not only canceled a scheduled state dinner with Obama, but also, soon later, decided not to purchase a Boeing fighter jet, an option that no longer seemed politically viable due to the NSA scandal (Pecequilo 2014). These experiences help explain Brazil’s ambiguity vis-à-vis international order. As Matias Spektor writes,

Read any Brazilian foreign policy college textbook and you will be surprised. Global order since 1945 is not described as open, inclusive or rooted in multilateralism. Instead, you learn that big powers impose their will on the weak through force and rules that are strict and often arbitrary (Spektor 2011).

Despite Brazil’s strong support for multilateralism, this reflects a fundamental disagreement about how global order worked in practice: for established powers in the West, a world order that is "easy to join and hard to overturn" may have its flaws, but the desire for change articulated by the likes of Brazil is still generally interpreted as a disagreements vis-à-vis the values which undergird today’s structures. Ikenberry...
O. Stuenkel calls the Post-World War II order a "distinctive blend of command and reciprocity, coercion and consent" in which the United States acts as a "liberal hegemon". Rather than being a liberal order of flat or non-existent hierarchies (akin to what President Woodrow Wilson had in mind after World War I), today’s order is built around institutionalized hierarchies, but the system also has "consent-based logics" embedded in it (Ikenberry 2011). And yet, the ambiguous mix of hierarchy and rules complicates Ikenberry’s hopes—reflected in Western mainstream IR—that non-Western or partially Western powers such as Brazil will join today’s order, for he does not spell out where in the pecking order rising powers supposed to fit in. Indeed, several emerging powers articulate their grievances of what they consider a hierarchical order where the strong often enjoy special rights, and where existing institutions do not offer sufficient space for newcomers—thus automatically generating contestation (Stuenkel 2017).

Yet that cynicism never led Brazil to become a revolutionary state with a revisionist strategy; rather, it strengthened the perception among Brazilian foreign policy makers that the system required reform and more decision-making power for developing countries like itself. The institutions that are at the heart of post-WWI order, while not providing emerging powers with the space and responsibilities that they deserved, still represented the best platform for Brazil to defend its national interests. Indeed, the seven and a half decades after World War II have been, in many ways, extraordinarily successful for Brazil, suggesting that the existing order positively impacted its capacity to transform itself from a poor rural economy to one of the world’s ten largest economies that was able to avoid armed conflict with any external powers. Revolutionary ideas, voiced at times by more radical scholars in the Global South, are rare in Brazil, and particularly when it comes to issues related to sovereignty, Brazilian foreign policy makers have often been more conservative—rather than radical—than their European or US counterparts (Flemes 2009). Indeed, one could argue that, rather than addressing the international system’s shortcomings and reduce hierarchies, Brazil simply sought to join the oligarchy made up of the select group of countries with a permanent seat on the UN Security Council (Taylor 2009).

In Brazilian IR literature, the country’s quest to gain a more prominent role was therefore not seen as a "stubborn pursuit of prestige but can be better understood as an attempt to achieve a stronger and more formal institutional role in managing the international order"—an assessment which implies a basic acceptance of the basic principles of the existing international system. Despite a consensus that Brazil’s path toward greater institutional recognition on the international stage would be a difficult, long and uncertain one, few observers fundamentally questioned or criticized subsequent governments’ ambitions for a more prominent role in international institutions. Yet interestingly enough, Brazil’s failure to achieve its key goals—such as a permanent seat on the UN Security—is generally not seen as a sign of an ill-conceived foreign policy, possibly because the claim

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1 An alternative explanation is that Ikenberry expected the benefits to be so significant that emerging powers could care less about status and hierarchy issues.
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for a greater say—or grievance—in and itself was regarded as an important and principled stance in the face of an order perceived to be flawed or even rigged in favor of rich and powerful countries (Spektor and Nedal 2010). When newly appointed José Serra, one of the few Foreign Ministers without diplomatic training, said in an interview in 2016 that he was unsure whether Brazil should continue to prioritize its quest for a permanent seat on the UN Security Council, his comments were not well-received in Brazil’s diplomatic circles and the IR community, and Serra soon clarified that he did not intend to alter Brazil’s overall aim to increase its representation in international institutions. His comments did not lead to a broader self-examination after decades of Brazil’s failure to achieve its aims. One possible explanation is that, despite having little to show, the quest for more status was seen to have few downsides, and even allowed Brazil to utilize its criticism of its lack of representation as a bargaining chip in other negotiations.

After a somewhat more passive and defensive posture during the military dictatorship, Brazil renewed its efforts to achieve UN Security Council Reform in the 1990s, again based on, above all, the argument that the body needed a better representation to retain its legitimacy, but increasingly pointing to the global public goods that Brazil could provide (Dauvergne and Farias 2012). Efforts to assume international responsibilities intensified during the commodity boom in the 2000s, when president Lula not only accepted the United States’ invitation to lead the MINUSTAH peacekeeping mission in Haiti, but also turned Brazil into an increasingly relevant humanitarian donor and provider of development aid (Stuenkel 2021). Brazil’s desire for a seat at the table of the powerful has often been described as an "obsession" or as the product of self-delusional ambition, symbolized by former president Lula’s controversial attempt to negotiate an Iranian nuclear agreement with Iran’s Mahmoud Ahmadinejad and Turkey’s Recep Erdogan in 2010 (Spektor 2010a, b). Yet, Brazil’s stance was also, as mentioned above, a consequence of its firm belief in the merits of the very system it deemed as unjust (Buser 2021). Still, the consequences of its many initiatives differed vastly. While Brazil’s leadership in Haiti strengthened its influence both in the UN and in Washington, Lula’s decision to ignore US warnings and negotiate with the Iranian government strengthened the belief in Western capitals that Brazil’s growing confidence on the international stage could lead to instability (Sotero 2010).

Yet while UN Security Council reform had always seen as difficult to achieve and ultimately dependent on factors Brazil could not fully control—such as the African Union’s indecision as to which African countries should become permanent members—Brazil was, particularly during the Lula and Rousseff government’s, focused on increasing its role in other formal institutions such as the International Monetary Fund (IMF) and the World Bank (Tude and Milani 2015). The unprecedented combination of geopolitical trends that emerged in 2008—a profound financial crisis among developed countries, paired with relative economic stability among emerging powers—caused a legitimacy crisis of the international financial order, which led, in the eyes of Brazilian foreign policy makers, to an equally unprecedented opportunity to push for reforms in the international system (Stuenkel 2013). While emerging countries including Brazil gained more decision-making power at both the World
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Bank and the IMF in the aftermath of the financial crisis—even though the changes took years to be ratified—Brazil’s overall impression remained that despite numerous assurances by the dominant powers about the need to provide more space to emerging powers did not translate into a real willingness to share power (Hurrell 2008).

After all, while Brazil succeeded in obtaining a larger share of the votes at the IMF, a key demand by Brazil and other emerging powers at the time to democratize the institution remained unanswered. At the G-20 Summit in 2009, global leaders announced that the heads of international financial institutions "should be appointed through an open, transparent and merit-based selection process" (Crook 2011). In 2011, however, European leaders failed to honor their promise and insisted on a European to replace Dominique Strauss-Kahn as director of the IMF—at the time, using the controversial argument that a European would be most adequate to address the financial crisis in Europe. In 2016, the French government nominated Christine Lagarde for a second 5-year term, maintaining a gentleman’s agreement, in existence since 1946, that a European should always lead the Fund. The same dynamic took place in 2019, when Lagarde became president of the European Central Bank, and Kristalina Georgieva, from Bulgaria, became Managing Director of the IMF. At the same, the EU’s insistence was criticized in both Brazil and Europe, where Thorsten Benner wrote:

Insisting on the right to appoint the Fund chief is a privilege completely out of touch with how the European Union should want to be seen around the world. EU members would be better off supporting an open search process for an outstanding non-European to be the next IMF leader. After a few cycles, qualified Europeans could apply again (Benner 2019).

It would be wrong, however, to place all the blame on the world’s established powers. When it became clear that Dominique Strauss-Kahn would resign as Managing Director of the IMF, European diplomats reacted swiftly and France quickly gathered widespread support for Lagarde even before BRICS countries had consulted about how to react. While the Mexican economist Augustín Carstens could in theory have obtained BRICS support, Brazil was reluctant to defend a candidate from another Latin American country, allowing the West to easily outmaneuver the emerging powers which had opposed yet another European leading the IMF (Stuenkel 2013).

Brazil’s call for broader reform at the World Bank was equally frustrated. When Robert Zoellick announced his departure from the institution in 2012, the Obama administration chose Jim Yong Kim, another US citizen, and missed the chance to boost the World Bank’s legitimacy among emerging powers, like Brazil, who believed the Bank’s governance no longer reflected today’s global distribution of power. The decision strengthened those in Brasília who sought to create alternative institutions such as the BRICS Development Bank, a much-debated topic during the BRICS summits that were taking place at the time (Dixon 2015). A transatlantic coalition had succeeded from 2008 to 2010 to craft a “voice reform” in the World Bank, which appeared to give developing countries a significant increase in their share of votes but in reality failed to lead to significant change. Including only
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low-income and middle-income countries—the Bank’s borrower members—the voting share of developing countries increased from 34.67 percent to only 38.38 percent, while the developed (high-income) countries retained more than 60 percent. Japan, Germany, the United Kingdom, France and Canada have even increased their share of total votes by a combined total of 4.1 percentage points after 2010. Seen from Delhi, Beijing and Brasília, the World Bank remained, despite its name, essentially a Western-dominated institution, with little perspective for broader change in the near-future.

In other spheres, too, emerging powers—due to a combination of inexperience and incapacity to coordinate among themselves—failed to carve out more space. In 2009, for example, Western states led by the UK, and the United States marginalized the United Nations General Assembly from a role in debating the global financial crisis and its impacts, so as to leave the subject to interstate organizations dominated by the West—which, naturally, were careful not to propose any measures that could be harmful to Western interests. Wade shows how Susan Rice outmaneuvered those who sought to give the General Assembly (the "G192") a larger role (Wade 2013). For example, General Secretary Ban Ki Moon denied any financial assistance to the Stiglitz Commission which had been tasked by the GA to provide an independent report. Despite the Commission’s competence, the United States argued that it was their "strong view that the United Nations does not have the expertise or the mandate to serve as a suitable forum or provide direction." In 2012, the United States and several European powers almost succeeded in stopping the United Nations Conference on Trade and Development (UNCTAD)—dominated by developing countries—from further analyzing the global financial crisis. As a senior U.S. delegate declared in one of the last negotiating sessions in Doha, “We don’t want UNCTAD providing intellectual competition with the IMF and the World Bank.” In effect, established powers argued, “We do not want UNCTAD to discuss any of these issues, because UNCTAD is not competent to do so. They are for the G20 and IMF (Wade 2013).” These developments consolidated the perception in Brasília that the institutional reform agenda of the first decade of the twenty-first century had failed, largely due to the resistance to reform of global structures (Miles 2013).

Brazil’s turn to informal organizations

Brazil’s turn toward informal organizations gained most visibility with the rise of the BRICS grouping, but the country had actually sought to strengthen its engagement with informals as early as 2003, when India, Brazil and South Africa united behind a new vision for South-South cooperation. Through the June 6, 2003, Brasilia Declaration, the three developing countries launched the India–Brazil–South Africa Dialogue Forum (IBSA), advocating a more equitable international economic system and greater influence for its members in multilateral organizations such as the United Nations Security Council (Stuenkel 2015a, b). Interestingly enough, the IBSA grouping emerged in part thanks to the existence of another informal group. When France’s president Jacques Chirac invited the three countries to the G8 summit in Evian, Brazilian, South African and Indian policy makers felt that their
participation was largely symbolic. "What is the use of being invited for dessert at the banquet of the powerful?" Luiz Inácio Lula da Silva, then Brazilian president, said later, arguing, "We do not want to participate only to eat the dessert; we want to eat the main course, dessert and then coffee (Kurtz-Phelan 2013a, b).” It was after the G8 summit in Evian that the three leaders decided to create their own organization. As Celso Amorim, Brazil’s foreign minister at the time, argued several years after IBSA’s founding, it was "time to start reorganizing the world in the direction that the overwhelming majority of mankind expects and needs (Amorim 2008).” By using this language, the Brazilian government sought to connect its interests to a larger sense of solidarity with the ‘Rest’ in the Global South (Cooper 2020a).

While that sounded revisionist to some, IBSA at no stage pursued a strategy meant to undermine the existing international order—rather, the grouping was meant to increase Brazil’s capacity to push for the reforms it had, along with South Africa and India, been calling for. The strategy to put these goals into practice was based on establishing stronger ties between ministerial bureaucracies and select sectors where cooperation was deemed promising, leading to trilateral working groups in numerous areas such as agriculture, environment, energy and defense (Stuenkel 2015a, b). In addition to countless ministerial-level meetings between 2004 and 2011, five presidential meetings took place during the same period—a remarkable change considering how limited ties between the three countries had been before. Mainstream IR literature only slowly adapted to this reality. In 2017, Kristen Hopewell argued that the grouping was far more important than commonly assumed, pointing out that Brazil, India and China in particular “worked together in concert, and with backing from much of the developing world, to oppose the longstanding dominance of the United States and other developed countries (…) Despite their diverse (and at times conflicting) interests, these three countries have a strong collective identity and strategic alliance rooted in their oppositional stance in relation to the established powers (Hopewell 2017).”

The IBSA Fund, which financed development projects for about a decade, was one of the more formalized arrangements. While the initial idea to promote the debate around innovative strategies for poverty reduction was laudable, the fund’s overall impact was always limited given that each country only contributed U$ 1 million per year. After less than a decade, the IBSA grouping ceased to play a relevant role in the three countries’ foreign policies. Rather than holding the 6th IBSA Summit as planned in June 2013 in New Delhi, the event was quietly postponed. While IBSA Foreign Ministers meet yearly on the sidelines of the UN General Assembly, no presidential IBSA summit has taken place since, possibly because South Africa’s integration into BRICS made IBSA superfluous.

Indeed, the most important informal for Brazil had emerged a few years earlier, when the Central Bankers and the Ministers of Finance of the BRIC countries met in São Paulo in November 2008. At the time, few observers identified the meeting as the emergence of one of the most important informal groupings in international affairs of the coming decade. "It’s time to bid farewell to the Brics", the Financial Times’s Philipp Stevens declared in 2011 (Stephens 2011). As New York Times reporter Jim Yardley wrote a year later, the BRICS were “troubled by internal rivalries and contradictions that have stymied the group’s ability to take any significant
action toward a primary goal: reforming Western-dominated international financial institutions (Yardley 2012).” In the same way, the Financial Times’ Martin Wolf argued that.

The BRICS are not a group. The BRICS were invented by Jim O’Neill [of Goldman Sachs, in 2001]. They added South Africa to the BRICS [...], which wasn’t originally there, to give some representation of Africa. These countries have basically nothing in common whatsoever, except that they are called BRICS and they are quite important. But in all other respects, their interests and values, political systems, and objectives are substantially diverse. So there’s no reason whatsoever to expect them to agree on anything substantive in the world, except that the existing dominating powers should cede some of their influence and power (Alessi 2012).

Yet, it would have a tremendous influence on Brazil’s international role, becoming so deeply embedded in its foreign policy identity that even Jair Bolsonaro, the far-right leader who was elected ten years later and had vowed to radically change the country’s foreign policy, decided to stick to it.

At the time of the meeting in São Paulo in 2008, little more than two months had passed since Lehman Brothers collapsed, and there was a sense in Brazil that a leadership vacuum had emerged that might represent an opportunity for emerging powers who were seeking to gain greater international responsibility. That leadership vacuum, from a Brazilian perspective, was the product of formal organizations’ incapacity to adapt to a new multipolar order—due to Western powers’ unwillingness to make space for emerging powers—and, as a consequence, due to their incapacity to provide the necessary public goods that were in demand at this moment of historic crisis. As Matias Spektor wrote at the time, the US went to war in the Middle East, Europe faltered, Asia rose, and the institutions that governed the world were evidently no longer up to the task. Unsettling as they were, these transformations opened up a new world of opportunities (Spektor 2013).

In this context, Brazilian foreign policy makers understood the rise of informal organizations such as the G20 and the BRICS as a means to not only gain a greater say in the global conversations, but also an important step toward bypassing the slow and frustrating negotiations that working through formal organizations entailed (Stuenkel 2017). Both the G20 and the BRICS groupings, of course, also gained visibility because their existence helped accelerate the debates about how the world’s major economies should react to the global financial crises and coordinate their responses, thus offering a crucial public good (Drezner 2014). This mindset also reflected the frustrations about the stalling of UN reform notwithstanding IBSA and the G4.

In the communiqué issued in São Paulo, the BRIC countries stated their dissatisfaction clearly: We called for the reform of multilateral institutions in order that they reflect the structural changes in the world economy and the increasingly central
role that emerging markets now play. We agreed that international bodies should review their structures, rules and instruments in respect of aspects like representation, legitimacy and effectiveness and also to strengthen their capacity in addressing global issues. Reform of the International Monetary Fund and of the World Bank Group should move forward and be guided toward more equitable voice and participation balance between advanced and developing countries. The Financial Stability Forum must immediately broaden its membership to include a significant representation of emerging economies (First Meeting of BRIC Finance Ministries Joint Communiqué 2008).

The G-20 grouping seemed to be the best platform to achieve this goal. A Brazilian policymaker went so far as to say that “the BRICs platform was a child of the G-20— which, in turn, is a child of the crisis.”—a marked differentiation from Goldman Sachs’ image of the BRICs (Stuenkel 2013). The creation of the New Development Bank (NDB), then, can be understood as a formal outgrowth of the informal BRICS grouping, raising interesting questions about whether the BRICS grouping will still be described as an informal grouping in future. It is worth pointing out, however, Brazil’s strong preference for leader-led informals—while the Finance Minister’s G20 was seen as useful, it was only once the Obama administration led the transformation of the G20 into a leader-led outfit that Brazil regarded it as a status-enhancing platform that Brazil regarded it as a status-enhancing platform, which gave Brazil’s president Lula direct access to global leaders such as Barack Obama, Angela Merkel and Nicolas Sarkozy. During the 2009 G20 meeting in London, Obama called Lula "the man", a comment that seemed to give Brazil a seal of approval the country had craved: by being called "the most popular politician on earth" by the world’s most powerful leader made Brazilian observers briefly forget Brazil’s long and frustrating attempt to be recognized as a country that deserved a seat at the table of the powerful (BBC, 2009).

In 2011, during the 3rd BRICS Summit in Sanya (China), a study group was put together comprising representatives of the BRICS’ respective development banks with the goal of discussing ways to strengthen cooperation among themselves. During the 4th BRICS Summit in New Delhi in 2012, the Framework Agreement on Financial Cooperation—within the BRICS Interbank Cooperation Mechanism—was signed by the member countries’ development banks in order to further facilitate the consolidation of trade and investment ties. Equally critical, leaders agreed to study the possibility of a joint development bank (Cooper and Farooq 2015). In the following twelve months, a group of policy makers from each country’s Ministries of Finance and Foreign Affairs convened regularly and wrote a viability report, which was presented a year later during the 5th BRICS Summit. Thereafter, the BRICS moved forward to begin the process of setting up the institution (Cooper 2016).

As Bhattacharya, Romani and Stern pointed out at the time,

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2 Cooper and Alexandroff point to the relevance of leaders in informals. See: Cooper and Alexandroff (2019) Assessing the variation of ‘leader-focused status’ in contemporary global governance. Contemporary Politics, 25(5): 532–548.
A new development bank is clearly needed. The infrastructure requirements in emerging-market economies and low-income countries are huge—1.4-billion people still have no reliable electricity, 900-million lack access to clean water, and 2.6 billion do not have adequate sanitation. About 2 billion people will move to cities in the next 25 years. Policy makers must ensure that the investments are environmentally sustainable. To meet these and other challenges, infrastructure spending will have to rise from about $800 billion to at least $2-trillion a year in the coming decades or it will be impossible to achieve long-term poverty reduction and inclusive growth (Bhattacharya et al. 2012).

Indeed, there was a consensus within BRICS capital markets that many emerging and low-income countries necessitated a major increase in infrastructure investment in order to alleviate growth constraints, respond to urbanization pressures and meet their crucial development, inclusion and environmental goals.

While considerations about development certainly played a role, however, the decision to create an entirely new institution—rather than merely using all additional funds to further contribute to existing institutions, such as the World Bank—indicates that the BRICS countries were dissatisfied with the pace of existing structures’ adaptation to their newfound power in the international system. Considering Western governments’ unwillingness to relinquish their dominant position in the Bretton Woods institutions, the idea to create a Global South-led institution appeared ever more attractive. Early on, the BRICS countries made clear that other developing countries should be eventually invited to join the bank, possibly in an attempt to show the African countries that Pretoria was acting on behalf of the countries of the Global South. Several countries signaled their interest in discussing the possibility of joining the bank and as of 2021, Uruguay, the Philippines and the United Arab Emirates had begun informal talks to join the organization. Since the NDB (often described as the "BRICS Bank") is set to include countries that are not part of the BRICS grouping, it is probably best to categorize the NDB as a formal institution, whereas the BRICS grouping remains, above all, an informal institution (Cooper and Farooq 2013).

It is important to point out, however, that despite Brazil’s growing emphasis on informal organizations, the country’s foreign policy elite at no stage abandoned existing formal institutions or reduced their commitment to them. Quite to the contrary—Brazil continued to clamor for UN Security Council reform, even though its insistence was less pronounced after the country entered a long political crisis and economic crisis starting in 2014. Throughout this period, Brazilian foreign policy makers seemed to continuously underline their commitment to existing institutions such as the UN, the IMF and the World Bank to assure that their embrace of informals would not be interpreted as turning the back on established international structures.

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3 Cooper and Farooq (2013) BRICS and the privileging of informality in global governance. Global Policy, 4(4): 428–433. For a more detailed discussion on this matter, see: Cooper and Thakur (2018) The BRICS in the evolving architecture of global governance. In: T. Weiss and R. Wilkinson (eds.) International organization and global governance. Abingdon: Routledge, pp. 283–298.
In both Brazilian academia and the broader public debate, Brazil’s stronger emphasis on groupings like BRICS and IBSA was far from consensual. Indeed, in part influenced by main IR scholarship, which paid virtually no attention to informal groupings such as BRICS, several scholars in Brazil expressed skepticism, either by considering them to be revisionist and related to the more radical left-wing ideas the president had espoused decades earlier, or—more commonly—that the BRICS grouping was unlikely to play a significant role in global politics (de Almeida 2011). Western mainstream observers almost unanimously rejected the setup’s relevance and routinely described it as “a disparate quartet” (The Economist 2009), a “motley crew” (Saran and Sharan 2012) or as an “odd grouping” (El-Shenawi 2011). The idea of the BRICS as a bloc, according to this narrative, was deeply flawed, and the BRICS member countries were too diverse to ever form a coherent group. As if to symbolize the ephemeral nature of the phenomenon, Goldman Sachs decided, in 2015, to close its BRIC fund (Stuenkel 2020). Yet while many criticized the BRICs grouping for its supposed incoherence, a crucial detail was often overlooked: Contradicting all expectations of the imminent dissolution of the group, the BRICs member countries worked toward strengthening cooperation, and Brazil played a crucial role in it.

When the far-right candidate Jair Bolsonaro was elected president in 2018, the trends described above gained an unexpected twist. Bolsonaro embraced a Trump-like anti-multilateral strategy, warned of the dangers of "globalism" and adopted a nationalist discourse that depicted international institutions, rules and norms as profound threats to Brazil’s sovereignty, rejecting the previous consensus that these very rules protected the country from outside intervention (Garcia 2019). Yet interestingly enough, Bolsonaro’s radicalism and desire to transform the country’s foreign policy did not extend to informal organizations such as the BRIC and the G20, which the president regularly attended. The explanation for this differentiation seems fairly simple: Bolsonaro’s strategy is most likely that informals struck him as less threatening than formal institutions. And yet, they also reveal that, when radical ideological changes occur at the domestic level, informals can be less vulnerable and thus help maintain a dialog that may no longer be possible on formal platforms. This dynamic is not Brazil-specific, but extends to other BRICS members, who maintained their commitment to the grouping despite political changes on the domestic level. In India, the BRICS grouping was strongly associated with center-left Prime Minister Manmohan Singh, but right-wing nationalist Narendra Modi strengthened India’s commitment to the BRICS grouping. The same is true for South Africa, where the BRICS grouping is seen as former president Zuma’s principal legacy, but where his successor Cyril Ramaphosa readily embraced the country’s BRICS membership.

Brazil’s case and lessons for the debate about informals

The above discussion about Brazil’s foreign policy strategy vis-à-vis both formal and informal international organizations offers important lessons beyond Latin America about how to think about the rise of informals in contemporary global
affairs. Over the past century, Brazil has been an active participant in formal organizations and a staunch defender of formal organizations. Yet, despite a broad consensus that embracing existing institutions would be the best way to defend the country’s national interests—and capacity to place Brazilian nations as heads of important institutions, such as the World Trade Organization (WTO) and Food and Agricultural Organization (FAO)—from Brazil’s point of view the experience has been somewhat frustrating, as a remarkably broad literature on the country’s failed attempt to become a permanent member of the security council member attests.\(^4\) Particularly during the global financial crisis that began in 2008, a consensus emerged among Brazilian foreign policy makers that the powers in control of the existing institutions were unwilling to support meaningful reforms that would help make them more representative. While UN Security Council reform had traditionally been seen as unlikely given the many requirements involved, many of which have little to do with Brazil itself—such as China’s reluctance to grant Japan permanent membership—the unsatisfactory reform process of the Bretton Woods institutions—particularly vis-à-vis the unwritten rule that the IMF must be led by a European and the World Bank by an American—led Brazil to actively search for alternatives such as the BRICS grouping and the G20, which could at least symbolically satisfy Brazil’s desire for a greater say on international matters.

As argued above, Brazil’s incapacity to fulfill its ambitious goals in the multilateral arena has not turned it into a revisionist power, as some have argued. Quite to the contrary: despite not achieving its principle aims, even left-wing leaders such as president Lula, who had long traditionally attacked the IMF’s influence in Latin America, provided unequivocal support to the institution as president (Tudel and Milani 2013). In the same way, despite the probability of UN Security Council reform being extremely low in the coming years, the country continued to fully support the United Nations until the election of far-right nationalist leader in 2018, who attacked it for reasons unrelated to the slow reform process.

There are five main lessons the case of Brazil offers about the study of informal organizations.

First, informals can serve as a source of status for emerging powers like Brazil who do not feel their relevance is being fully reflected by formal institutions, and particularly so when public distrust of some formal institutions is rife, as has long been the case with the IMF across Latin America (Cooper and Alenxadroff 2019).\(^5\) This may be of little relevance to great powers such as the United States, who do possess a dominant role in international institutions and which do not, in any case, need international institutions to confirm their status. In the same way, small powers have only very limited status ambitions and thus do not expect to gain much

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\(^4\) See, for example: Barbosa (2011) Review: Costa Vargas, J. A. Campanha permanente: o Brasil e a reforma do Conselho de Segurança da ONU. Rio de Janeiro: Editora FGV, p. 130. Soc. & Nat. 25(1): 217–219. See also: Tudel and Milani (2013) A Política Externa Brasileira em relação ao Fundo Monetário Internacional durante o Governo Lula. Revista Brasileira de Política Internacional 56(1): 85–103.

\(^5\) Cooper and Alexandroff (2019) Assessing the variation of ‘leader-focused status’ in contemporary global governance, Contemporary Politics, 25(5): 532–548. See also: Parlar Dal (2019) Status competition and rising powers in global governance: an introduction. Contemporary Politics 25(5): 499–511.
status through their participation in multilateral organizations. Ambitious middle or regional powers like Brazil or emerging powers with great power ambitions tend to be dissatisfied with multilateral organizations, as they are generally too weak to be granted a "seal of approval" of being a great power, such as a permanent seat on the UN Security Council, and created a status mismatch between how their perceive themselves and how they are treated at multilateral fora. Informals fulfill a particularly important role in this context. While the way they chose their members is inevitably arbitrary, reflected by perennial discussions about whether the composition of the BRICS grouping makes sense or not, they confer a degree of status that countries like Brazil do not gain elsewhere, thus reducing the degree of frustration such countries experience when engaging internationally. While observers may reject the perks BRICS or G20 member countries gain as empty symbolism, a careful analysis of how Brazil engages with both groupings suggests otherwise. Particularly at times of domestic crisis, as was the case during the brief Temer presidency, G20 and BRICS meetings allow the Brazilian head of state to engage with fellow leaders in a way they could not without the existence of such groupings. The same is true for India and South Africa, whose leaders gain access to and photograph opportunities with global decision-makers that they would otherwise meet far less frequently. In this sense, one may argue that informals possess the capacity to assuage status anxiety experienced by middle powers, reducing the perceived status mismatch by providing participating countries with global visibility.

Second, Brazil’s case shows that while extreme ideological swings on the domestic levels may severely impact countries' behavior vis-à-vis formal organizations—and Brazil, in fact, become a spoiler in many UN negotiations during the Bolsonaro government—participation in informals may be less affected, and thus better suited to maintain a minimal dialog when the country in questions retreats from multilateralism. In Brazil’s case, engagement in the G20 and the BRICS groupings has been crucial to avoid deeper political isolation. After all, Brazil’s president is seen as a persona non grata in both Western Europe and the United States and has celebrated a single bilateral visit in the region during his first two years of his presidency. Whether this is desirable from a normative point of view is debatable, of course. After all, what is the value of far-right leader Jair Bolsonaro, whose environmental and public health strategy during the pandemic posed a concrete threat to the international community, maintaining yearly meetings with his Indian, Chinese, South African and Russian counterparts (McCloy 2021)? Critics could even argue that encounters like the BRICS and the G20 end up creating a permissive environment that lowers the cost of irresponsible behavior, since the risk of complete diplomatic isolation decreases significantly. After all, while Russia experienced widespread criticism and diplomatic isolation in the West after the invasion and annexation of Crimea, Vladimir Putin could always count on continued diplomatic protection from other BRICS members—even Brazil and India, traditionally seen as stalwart defenders of sovereignty and international rules and norms (Hett and Wien 2015). In the same way, BRICS countries were predictably quiet when Western policy makers criticized the prison sentence for Russian opposition leader Alexander Navalny in February 2021, and BRICS members would probably not criticize China if a conflict with Taiwan broke out.
Third, and related to the second issue, Bolsonaro’s decision to attack "globalist" institutions such as the United Nations but continue his relationship to both BRICS and the G20 may not be coincidental, but how that informal institutions are more resilient to populist "anti-globalist" backlashes than formal institution, even though this issue certainly deserves additional research involving other case studies. At an age of rising nationalism, aggravated by the US-Chinese trade war and the pandemic, informals may not be the ideal platforms for governing the globe, but they may be the best option available. Indeed, the emergence of other informal outfits such as the Quadrilateral Security Dialogue (known as "Quad") between the United States, India, Japan and Australia, assure a dialog and satisfy a specific demand that formal institutions are less likely to provide. Just like the G20, which adopted its current leader-led format to address a very specific global challenge in the midst of the 2008 financial crisis, the Quad leaders summit, which took place in February 2021 for the first time, sought to deal with growing concerns about the rise of China in member countries (Cooper 2010). Yet if the fate of the G20 and the BRICS grouping, and Brazil’s continued commitment to them suggests, informals often outlive the specific environment that led to their rise. As we are moving toward multipolarity, the future landscape of international institutions and global governance is likely to be increasingly populated by informals.

Fourth, Brazil’s stance vis-à-vis informals matters greatly as the country is set to be at the center of two key issues that will impact global governance more than anything else: global health and climate change. In the realm of global health, it seems likely that the World Health Organization (WHO) or a similar structure will play a more prominent role in the aftermath of the covid-19 pandemic. Given the unusually high death toll in Brazil and the president’s opposition to social distancing measures, his criticism of the WHO and the risk the country posed as a potential environment for the emergence of more resistant variants, informals may be a potential path to minimally engaging the country—after all, the government regards formal institutions such as the UN or the WHO as invasive tools meant to undermine Brazil’s sovereignty. Bolsonaro’s Foreign Minister Ernesto Araújo routinely described the covid pandemic as a "communist plan" and the World Health Organization as a tool to implement its globalist ideology (O Globo 2020).

In addition, Brazil’s role in the global combat against climate change will be essential given that the country is home to the majority of the Amazon, the world’s largest tropical rainforest—yet the current government has been subject to growing international condemnation due to its decision to roll back much of the progress made over the past decades in the realm of deforestation. In addition to a persistent belief that environmental protection places a drag on economic development—a misconception that weighs even more heavily on Brazil given its status as a commodity-dependent economy—the Bolsonaro government sees environmentalism as a Trojan Horse meant to undermine its sovereignty. This strand of thinking has been strengthened by the ongoing debate about whether “ecocide” should be considered an international crime, as well as international conjecturing about outside intervention in the Amazon (Mehta and Merz 2015). In this context, informals may be an opportunity to engage a country whose leader is deeply suspicious of any kind of
international cooperation, but whose collaboration is crucial to address deforestation and climate change.

Finally, as Cooper points out in this volume, mainstream IR literature still struggled to adequately assess the relevance of informals and has continuously underestimated their impact when trying to make sense of the foreign policy strategies of countries like Brazil. At least in part, this may be due to a growing but still limited understanding of the views of emerging powers and countries in the Global South, like Brazil, about global order and international institutions.

Declarations

Conflict of interest On behalf of all authors, the corresponding author states that there is no conflict of interest.

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