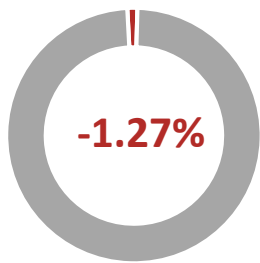


Brazil: Recovering, Not Winning

At first glance, not much seems to have changed concerning Brazil's power during the last years: South America's biggest country shows a negative Power Shift Rate of -0.02 percent for the period of 2015 to 2017, the same figure as during the phase of 2013 to 2015. Brazil thus continues its sluggish power development. Since 2012, a slightly negative, but irregular curve has been recorded by the BPSM. Nevertheless, Brazil was able to defend its place on our Power Score ranking: It is still ranking 12th out of 19, which puts Brasília seven ranks ahead of the only other G20 South American power, Argentina.

Power Shift 2015-2017

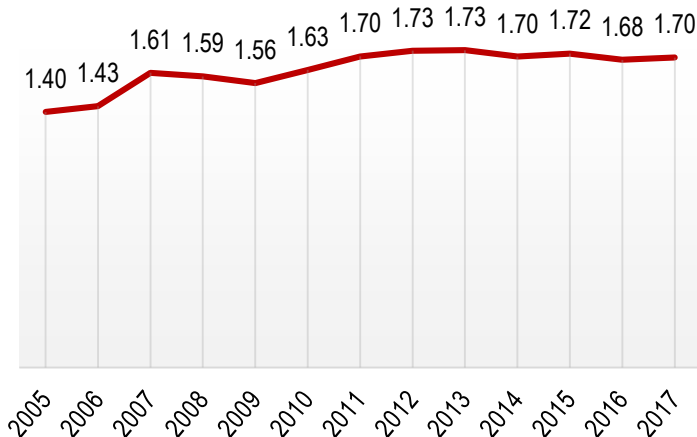


A look at the Rate of Country Change (CC), which indicates a country's absolute development during the period, reveals that not everything is nearly unchanged: While Brazil achieved a CC of 7.77 percent in 2013/15, it is only 3.14 percent for the following two-year period.

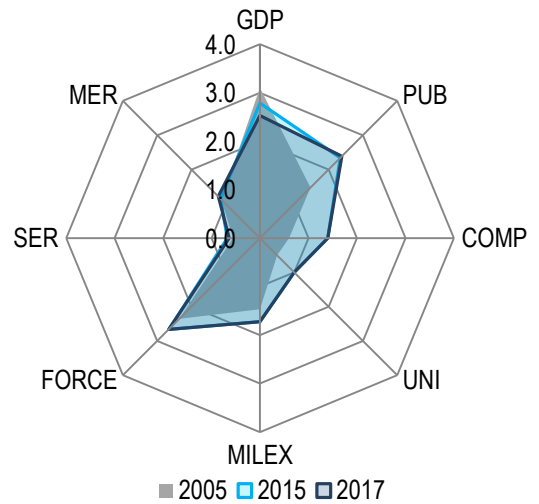
This rate is even below the G20 average and raises the question, whether Brazil can still be referred to as a rising power. However, it must be taken into consideration that the positive absolute development of 2013/15 was mainly the result of Brazil winning one more university.

An even more dynamic development can be observed regarding the individual categories: four out of five categories with a negative development in absolute terms for the 2013/15 period have shown progress during the latest phase. Those categories are primarily economic ones (GDP, merchandise and service exports), with the most astonishing change occurring in merchandise exports.

Brazil's Power Scores



Brazil's Global Shares



This indicates that Brazil is recovering from the economic recession that started in 2014. Moreover, Brazil's absolute figures did not decline in any of the individual categories during the most recent period, although the numbers of top universities and companies have stagnated.

Having said that, the positive absolute development of the categories does not translate into similar relative gains: Only merchandise exports and scientific publications show an absolute and relative increase, while all other categories are either stagnating or showing relative losses (for example GDP, with a Market Change of -0.26 percent).

Thus, even though Brazil seems to be recovering from its economic problems, the absolute increase is not big enough to make relative power gains. With Australia, which ranks 13th in 2017, being just 0.04 Power Score points behind Brazil, South America's biggest power has to increase its efforts in order to defend its place in the BPSM in the years to come. It remains to be seen which effects the pro-military and liberal market policies of Brazil's new president, Jair Bolsonaro, will have on Brazil's power development.

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