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IN LATIN AMERICA

OCTOBER 2022

Brazil

Presidential Elections - Run-off Post-election Report



Executive Summary

This Sunday, October 30, voters returned the head of **Brazil's Workers Party, Luiz Inácio 'Lula' da Silva, to the presidency for a third time** in the narrowest of wins over incumbent and arch-rival Jair Bolsonaro.

Turnout was higher than for the general elections (unprecedented in Brazil since 1985) with only 0.37% of eligible voters staying at home – partly **explaining how Bolsonaro was able to amass 7 million more ballots since then, if eventually losing by a margin of 1.80%.**

Even were an orderly transition now to take place – at the time of writing there had been no word from Bolsonaro, but Brazil's electoral authority said it had spoken to him and on that basis offered reassurances he will not contest the results – **Lula faces the daunting task of presiding over a deeply split country and with the shadow of the former military boss set to loom large over his presidency.** Nowhere will that be felt so keenly as in Congress, especially the Senate, which is about to welcome in more 'Bolsonarist' MPs than ever before, to say nothing of the fleet of anti-Lula governors poised to take office across the country.

To negotiate this and avoid deepening rifts further – and to quell the upsurge in violence that has accompanied the elections – Lula will likely continue in his centrist approach to attempt to get on-side center-ground factions and **build support for his goals on hunger and sustainable growth.** Before that, though, he will need to unify his own fragmented coalition for government.

The Election in Numbers

50,9 %

votes won by Lula

the victory margin

1,80 %

0,36 %

the increase in turnout over the first round

the fraction of invalid or protest votes (0.18% up on the first round).

4,59%

0

Public announcements from Bolsonaro since the results became known. Brazil's electoral authority has apparently spoken to him and on that basis offered reassurances he will not contest the results

Key questions

What is at stake?

The **president and vice-president**, as well as governors and vice-governors in the twelve states where there was no victory in the first round.

How and who votes?

The vote is **direct, secret and universal**. It is mandatory for all citizens between 18 and 70 years of age (while voluntary for those who self-class as illiterate, and for those between 16 and 17 and or over 70). More than **156 million voters are entitled to vote** in these elections.

How is the new Executive Branch elected?

The president and vice-president are elected **through a second round absolute majority system**. As no one obtained more than 50% of valid votes in the first round on October 2, the two most voted-for candidates, **Lula and Bolsonaro, have passed to the second round, with the winner the one attracting the most votes** (i.e. there are no thresholds to pass or, in theory at least, margins of victory to satisfy). The same electoral system applies to governors and deputy governors.

When do the new President and Governors take office?

On **January 1, 2023**. They will have a term of office of 4 years as of that date.

When do the Deputies and Senators assume?

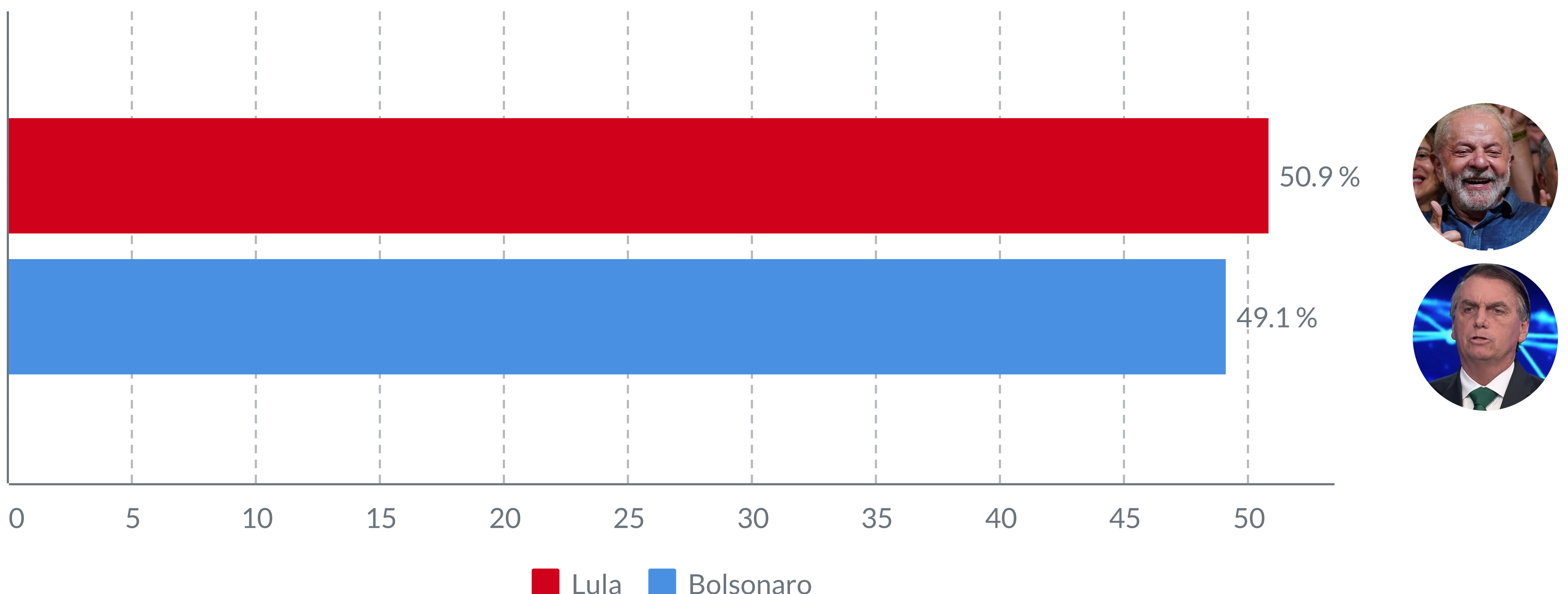
Unlike the presidential election, the make-up of the new Legislative branch was determined after the first round of elections. Thus, **the elected legislators will take office as of February 1, 2023**. The tenure for national senators is 8 years, being partially renewed every four years at the alternate rate of one third and two thirds. In the case of Deputies, the term of office is 4 years with a proportional electoral system.

Results

With all votes counted, **Luiz Inácio 'Lula' da Silva has been elected next president of Brazil with 50.90% of the vote versus 49.10% for Bolsonaro.** Amid a fiercely contested runoff the margins were unexpectedly tight with the Workers' Party boss eventually winning by some 2.1 million ballots (or 1.8%).

This is the **slimmest percentage difference (1.8%) in favor of a winner since 1989**, and the first time that an incumbent president has not been reelected in the country. In a day of great uncertainty, it was not clear who would win until more than 90% of the votes had been counted. The official announcement was made at 8pm in Brasilia when the Superior Electoral Court (TSE) declared Lula's victory and he gave a speech shortly after.

Results: Valid votes



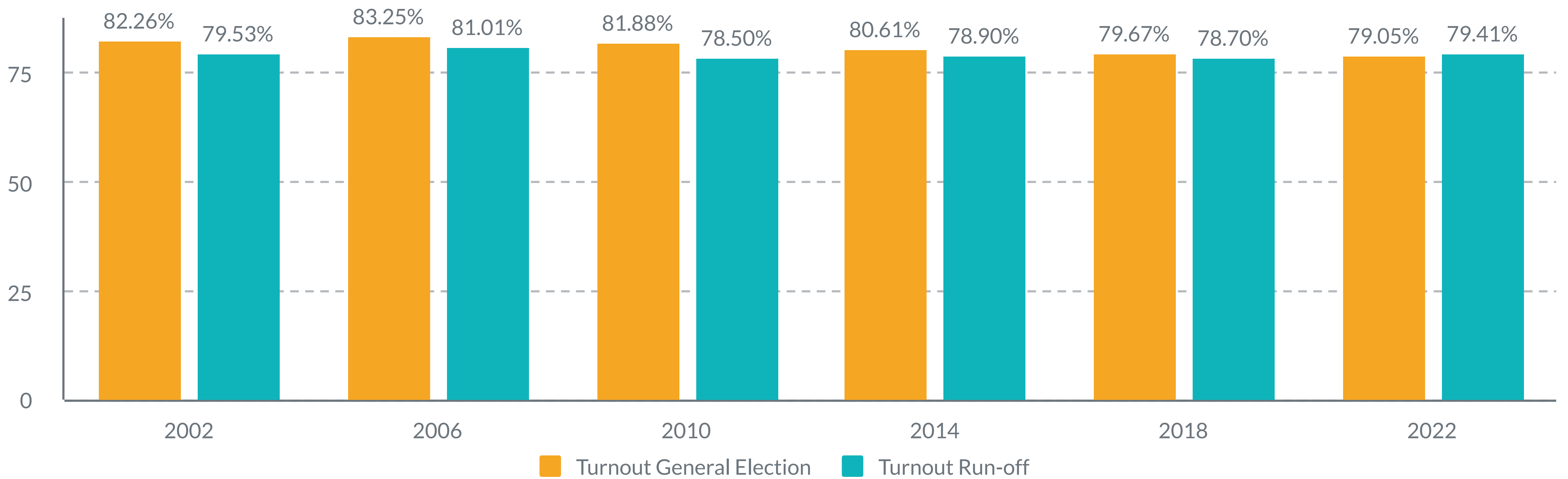
Source: Own elaboration based on data from the Supreme Electoral Tribunal with 100% of the counted votes.

Attendance

Bucking the historical trend, turnout increased, **with those opting to stay at home falling from 20.95% in the first round to 20.58% in the second.** This likely reflects the high-profile of the election and the flaring of divisions during its runup, with more citizens than ever mobilized to cast their vote.

Strong and persistent calls for **people to come out and vote, especially from Bolsonaro, can take credit for this too, with the incumbent president arguably the best placed to benefit from it.** Ultimately, however, additional voters made up little more than 300 thousand so were not significant enough to swing the result one way or the other.

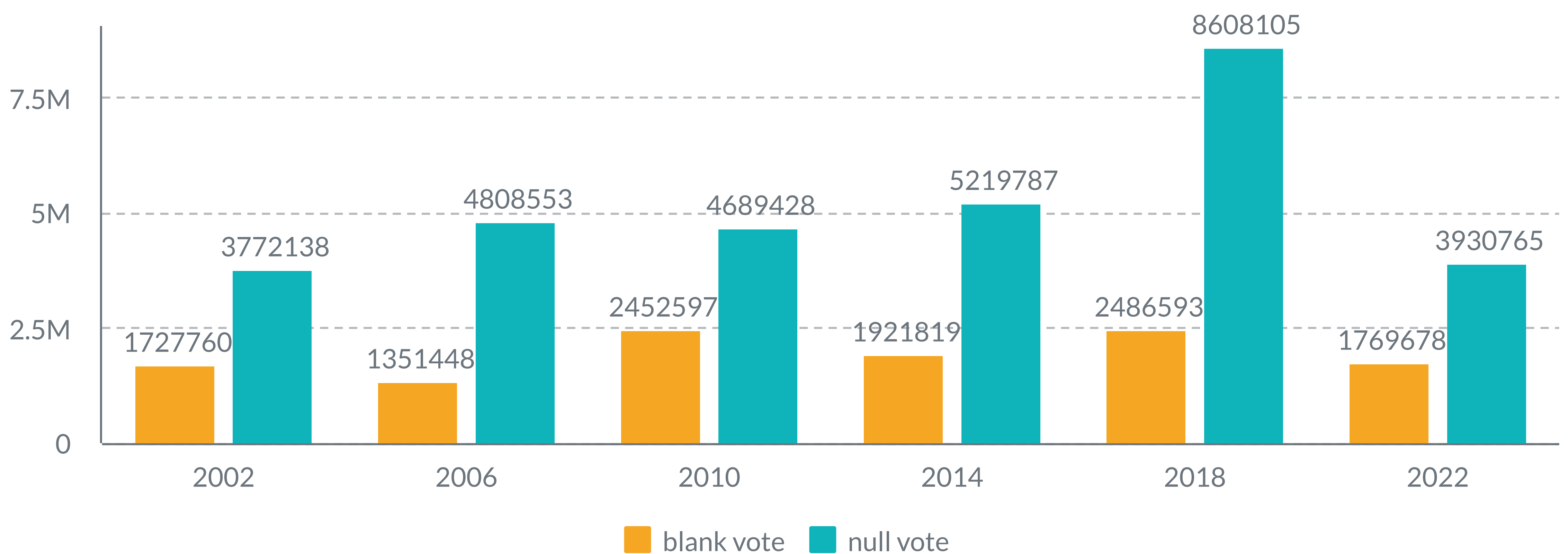
Turnout 2002-2022



Blank and null vote in the runoff election

Another factor thought to be key before the elections was the number of protest voters. However, levels of such blank or null votes also changed insignificantly - indeed they rose ever so slightly, from 4.41% to 4.59%, indicating more not less dissatisfaction with both candidates.

Blank and null votes in run-off 2002-2022



Alliances and vote switching

If both the turnout and the levels of ‘angry voting’ had a little effect on the outcome, that which **turned out to be decisive was the 8.37% of voters backing other candidates on October 2** (which after that were eliminated).

Lula, since the first round, gained the endorsements of the **third and fourth most voted-for contenders: Simone Tebet of the Brazilian Democratic Movement (MDB, in Portuguese)**, which had received 4.12% votes, **Ciro Gomes of the Democratic Labor Party (PDT, in Portuguese)**, who had

got 3.04%. **The closeness of yesterday's result, however, clearly illustrates the limited usefulness of such endorsements**, at least on this occasion, since voters were clearly less concerned than expected with heeding the preferences of the runners they had backed in the general election.

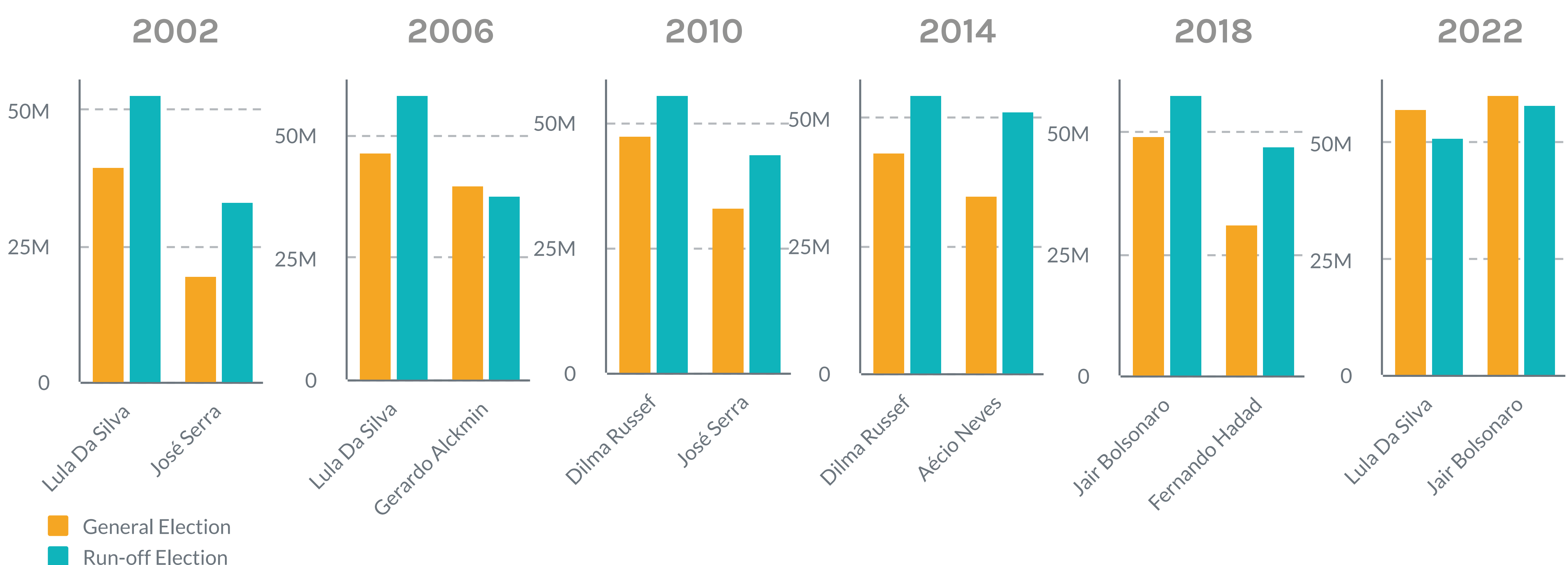
In fact, the numbers seem to suggest many of them flocked to Bolsonaro's side, lining up alongside his core supporters along with, one assumes, the vast majority of those few who had backed other runners in the general elections; **together these cranked up Bolsonaro's share of the vote by 5.9% compared with the first round**. But it wasn't enough. Ultimately, Lula did get on-board (just about) enough of those who had backed former runners now endorsing him, as evidenced in his own increase on his previous voting share of 2.47%

Growth between rounds of elections, historical comparison

The importance of broadening the electoral base and attracting votes from other spaces was more relevant in Bolsonaro's political strategy than for Lula. This is evident given that the past five presidential elections have been defined in a second round. Of those five, Lula competed in two (2002 and 2006), in none of which he lost votes. At the same time, in almost all of them, the candidates who made it to the runoff added votes even though voter participation decreased. The only candidate who lost votes was Gerardo Alckmin.

It is interesting to point out that in this election this trend was maintained and both candidates increased their social support. The territorial campaign work that led Bolsonaro to visit Minas Gerais on multiple occasions allowed him a growth of more than 7 million votes with which he almost managed to twist the election in his favor. However, Lula, propped up by his deep support in the northeast, managed to grow a little more than 3 million suffrages, condemning the election in his favor.

Number of votes in the general election and in the run-off 2002-2022



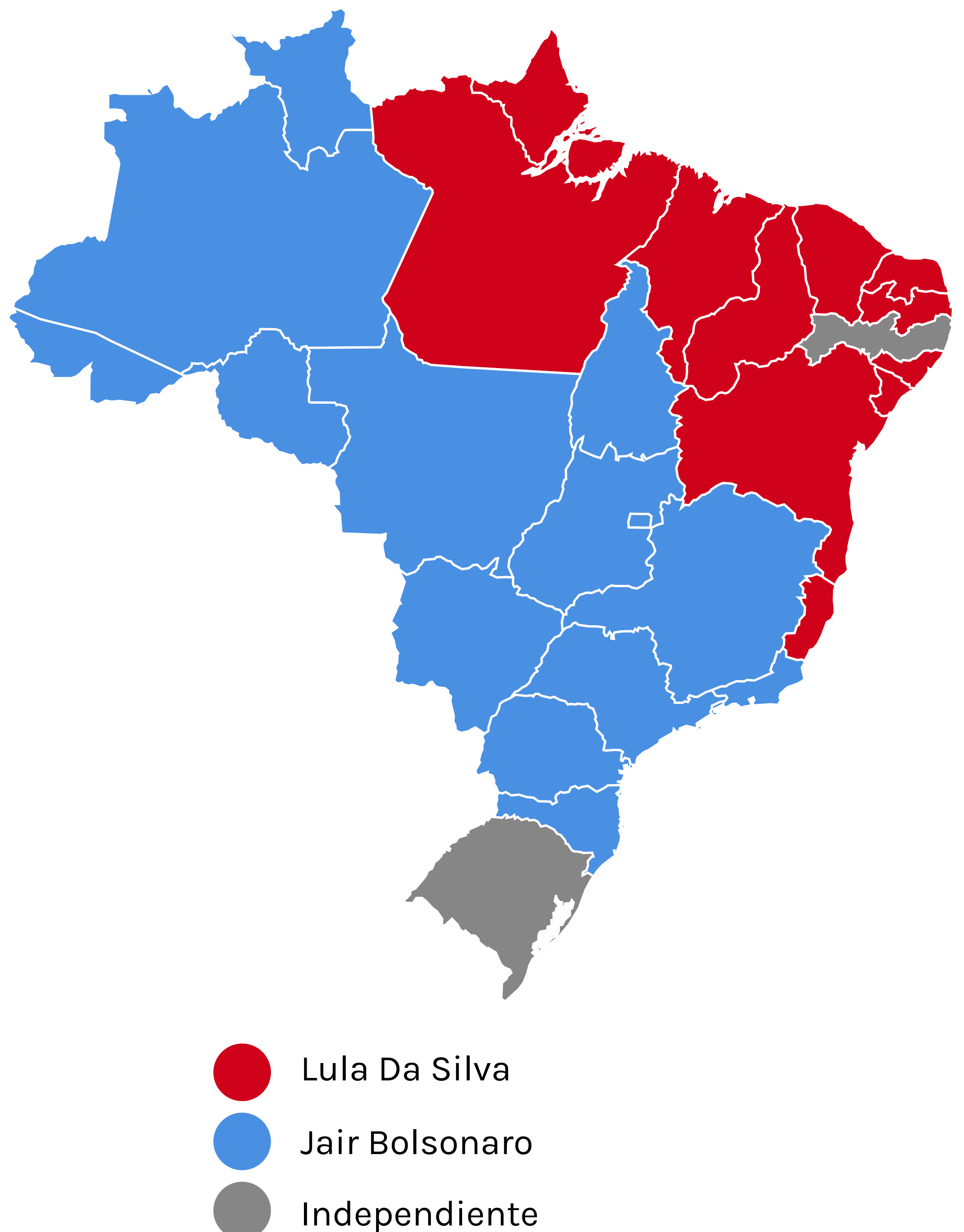
The territorial issue

During the campaign for the runoff, **Bolsonaro put a lot of effort in reversing the negative trend in Minas Gerais, and in consolidating his advantage in São Paulo and Rio de Janeiro.** The first point responded to the president's consideration that the support of that enclave was "key" following the formula known by all Brazilian politicians according to which whoever wins in Minas Gerais wins at the national level. **This interest was also present in Lula who tried to deepen his campaign in that state.**

As in the national election, Minas Gerais was finally won by Lula by a narrow margin (0.4%). Looking at the results disaggregated by region, the petista won a resounding victory in the Northeast of Brazil and achieved some important victories in the North and Southeast that earned him the victory. Bolsonaro, on the other hand, showed much strength in the South, and won key support in the country's most populous territory, São Paulo. He also won Rio de Janeiro but it was not enough to reverse the final result.

Having won the election, Lula will now have to look at the map of territorial power at the sub-national level with which he will have to deal. **Of the 27 governors in Brazil, only eleven will respond to the petista leader, while the other 14 are closer to Jair Bolsonaro.** There will also be two independent governors (Rio Grande Do Sul and Pernambuco). A transcendental example is what happened in São Paulo: despite Lula's support for Fernando Haddad, the governorship was won by a wide margin by Bolsonaro's candidate, Tarcísio Gomes de Freitas. **Thus, at the sub-national level, Lula will also have to show a capacity for consensus building and negotiation.** A priori, a first positive indicator for Lula is that the aforementioned new governor-elect of São Paulo has already advanced that he is willing to dialogue with the national government.

Governors 2023-2027



Elected Candidate

Lula Da Silva (Brazil of Hope)

Vicepresident:
Geraldo Alckim

Born in Pernambuco, in northeastern Brazil, in his youth he was a metal worker and trade unionist. He began his political involvement by opposing the dictatorship in the 1980s and was the leader of one of the most important strikes during this period.

He ran for president three times until he finally won in 2002 and was re-elected in 2006 after defeating his running mate, Geraldo Alckim. During his administrations, he achieved solid economic and social results, on which he relies today to promote his candidacy.



He was sentenced in **2017 to prison, having spent 580 days in detention for the corruption case known as Lava Jato.** However, his sentence was overturned in 2021 by the Supreme Court. Thanks to that sentence, he was able to run in this year's elections.

For these elections, his leftist prose is complemented by a moderate discourse due to the type of alliances he has built, especially with his vice-presidential candidate. It also incorporates environmental demands underpinned by the incorporation of the Green Party to the coalition.

Government plan

Two days before the election, Lula published a "[Letter for the Brazil of tomorrow](#)" where he gives some details about the policies he will seek to implement in the third term he finally obtained. In line with what he proposed during the campaign, he emphasizes the construction of "a national strategy to advance in the direction of the knowledge economy" with the objective of not depending on the importation of elements such as fertilizers, gasoline or microprocessors.

To "increase production without deforestation", he proposes the implementation of the **Degraded Pastures Recovery Plan**. He promises efforts in regional integration both in Mercosur and in other Latin American initiatives together with dialogue with the BRICS, African countries, the European Union and the United States. He also mentions that he will work on labor reform, a minimum wage that beats inflation, equal pay for men and women and a debt negotiation program with discounts and low interest rates.



Proposals

- Repeal the labor reform passed during Temer's administration and propose a new one that "strengthens collective negotiation and union representation with special attention to informal and app workers."
- Turn Brazil into a world ecological power, with emphasis on the protection of the Amazon
- Make the digital, energetic and ecological transition to achieve a new productive structure of greater technological density and low carbon
- Build an environment of greater diversity and plurality in the media with legal and institutional frameworks in favor of democracy, human rights and national sovereignty.
- Propose a pension reform with an eye to the expansion of the system, as well as its coverage and financing.

> [Click here](#) to see his full Government Plan.

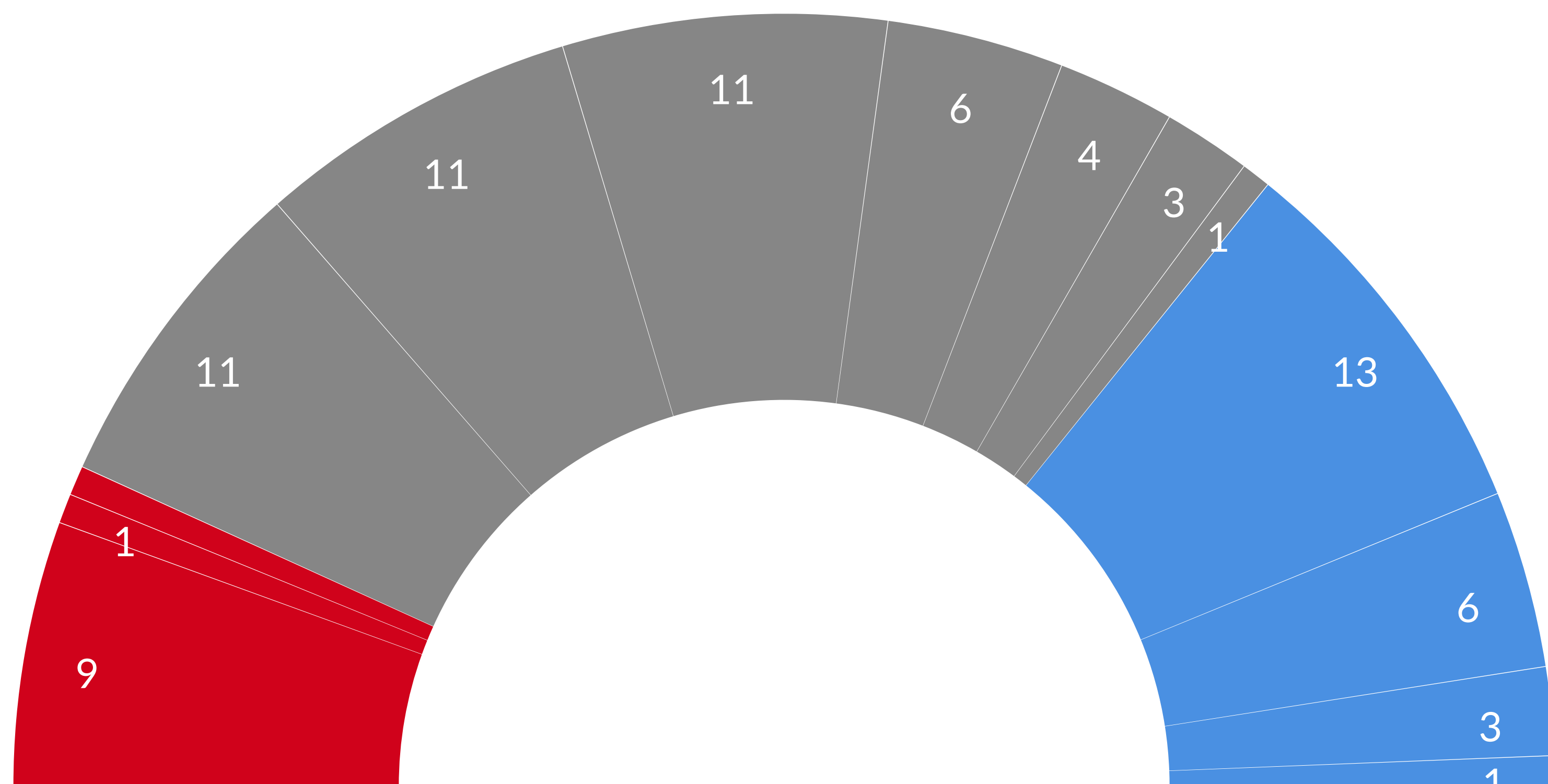
What kind of legislature will Lula have to work with?

The congress defined by the first round of elections on October 2 will have to govern and dialogue with the coalition led by Lula, known as Brasil de la Esperanza (in Spanish). **The main difficulty will be in the Senate, where the spaces that respond to the current president are larger and there may be more willingness to exercise an intransigent opposition.**

In any case, it will be essential for Lula to be able to **build bridges with the center, such as Unión Brasil (in Spanish), in order to achieve the approval of proposals of political weight, highlighting the structural reforms that the new president will need to promote his government agenda.**



Senate



■ PT (11.11%) ■ Pros (1.23%) ■ PSB (1.23%) ■ União (13.58%) ■ PSD (13.58%) ■ MDB (13.58%)
 ■ Podemos (7.41%) ■ PSDB (4.94%) ■ PDT (3.7%) ■ Cidadania (1.23%) ■ PL (16.05%) ■ PP (7.41%)
 ■ Republicanos (3.7%) ■ PSC (1.23%)

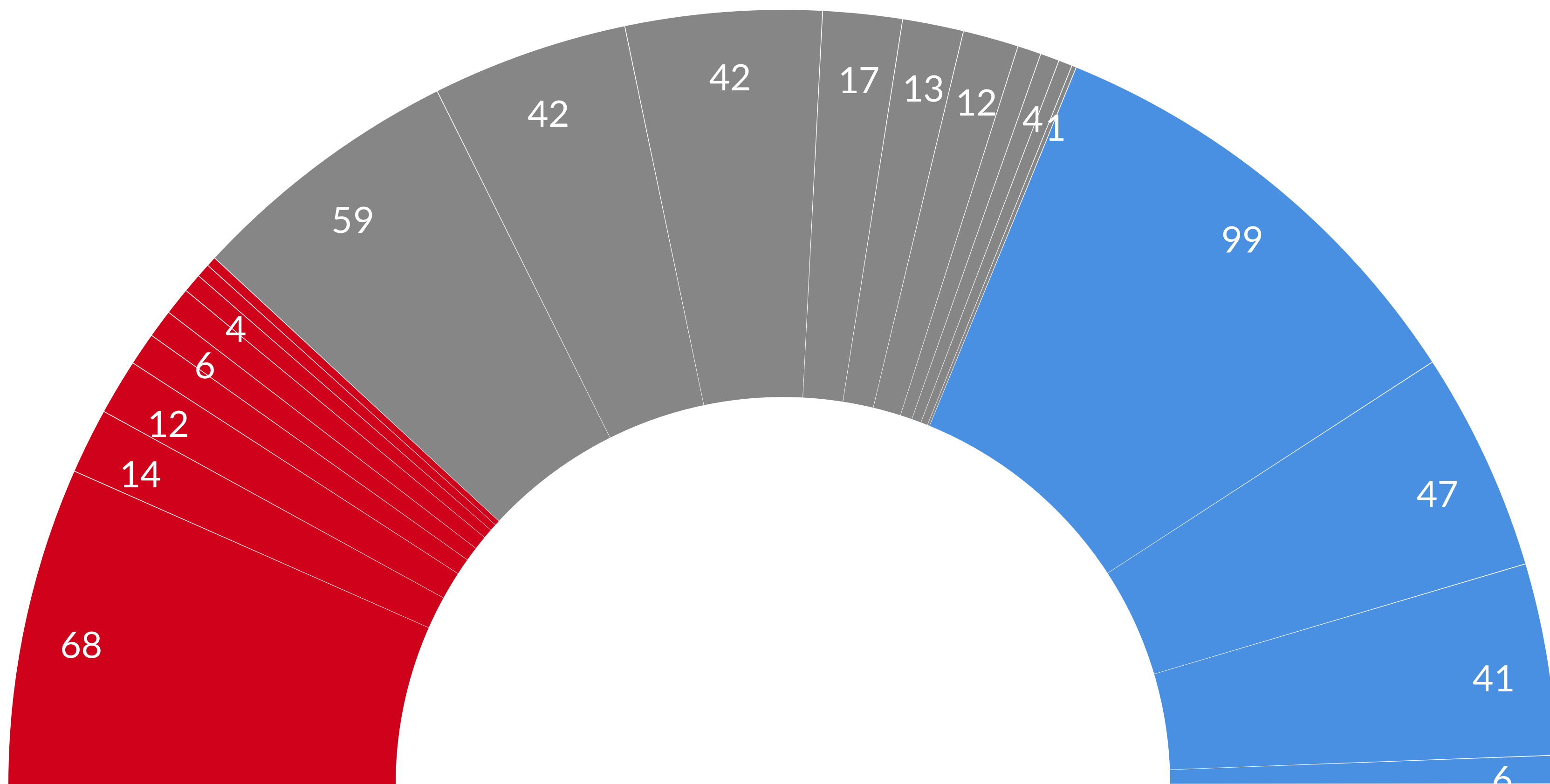
Note: The senators of Lula or similar spaces are listed in red. In light blue are those that respond to Bolsonaro, while in gray are the spaces not completely aligned to one or another space.

In the Senate, the largest bench will go to Bolsonaro's party, the Partido Liberal (PL in Spanish), which will occupy 13 of the 81 seats in the Senate. Thus, in the Senate, the victory of the Partido Liberal indicates a more marked support for Bolsonaro than in the Deputies, with the presence of legislators who openly support him and who were part of his administration, such as Hamilton Mourão and Damares Alves. Together with other allies, the Bolsonaristas will have 23 senators.

On the other hand, Lula will have 9 senators from the PT plus 1 from Pros and another from the PSB, totaling 11 out of 81. In this sense, the role of the Unión and Progresistas (PP), who are analyzing the possibility of creating a party block to act jointly and increase their political weight to negotiate with the Executive, will be transcendental. They would then be the ones with the largest bench, which would consist of 17 senators.

Finally, and after the runoff election for governorships, the composition of the Senate was finally defined. With the defeats of Rodrigo Cunha (Unión) in Alagoas and Rogerio Carvalho (PT) in Sergipe, these parties hold their seats. As Jorginho Mello of the Partido Liberal won in Santa Catarina, he will be replaced by Ivete da Silveira and the Movimiento Democrático Brasileño (in Spanish) bench will increase by one seat. Both Eduardo Braga (MDB) for Amazonas and Marcos Rogério (PL) for Rondônia were defeated in their states and will remain senators.

Deputies



■ PT (13.26%) ■ PSB (2.73%) ■ PSOL (2.34%) ■ Avante (1.36%) ■ PCdoB (1.17%) ■ PV (1.17%)
 ■ Solidaridade (0.78%) ■ Pros (0.58%) ■ Rede (0.39%) ■ União Brasil (11.5%) ■ MDB (8.19%) ■ PSD (8.19%)
 ■ PDT (3.31%) ■ PSDB (2.53%) ■ Podemos (2.34%) ■ Cidadania (0.97%) ■ Patriota (0.78%) ■ Novo (0.58%)
 ■ PTB (0.19%) ■ PL (19.3%) ■ PP (9.16%) ■ Republicanos (7.99%) ■ PSC (1.17%)

Note: The deputies of Lula or similar spaces are listed in red. In light blue are those that respond to Bolsonaro, while in gray are the spaces not completely aligned to one or another space.

In the Chamber of Deputies, the Liberal Party also has the largest bench, having risen from 76 to 99 legislators. **In second place is the Brasil da Esperança federation, composed of the Workers' Party, the Green Party and the Communist Party of Brazil, with a total of 80 deputies.** Next are the supporters of Union Brasil (59) and Progressistas (47), which together total 106 legislators. These two parties are consolidating, as in the Senate, as a force with which it will be fundamental to weave alliances that will allow Lula to get closer to the necessary numbers to promote his legislative agenda.

The polarization observed in 2018 between Bolsonaro's party and the forces accompanying the Workers' Party is sustained. The growth of the benches of both the Liberal Party and Union and Progressives delineates a conservative profile for the Chamber which could facilitate the advancement of Bolsonaro's proposals such as those referring to increased penalties for certain crimes.

This will not necessarily imply that Lula will find automatic opposition in the Chamber of Deputies. It is worth noting that not all within the Liberal Party consider themselves "Bolsonaristas" and that the current president only joined the party last year.

This time, with the legislative innovation of party federations, there are 19 benches as opposed to the 30 parties that competed in the last elections. Although it is still a very fragmented Chamber, the polarization of the presidential election added to the new rules contributed to make this characteristic less marked.

Conclusions

- **Lula da Silva will begin his third term in office next January 1st, an unprecedented event for Brazilian politics.** With the charisma that identifies him and his demonstration of strength in important electoral districts, especially with his advantage in all the provinces of the Northeast, he achieved an important popular support that was translated into votes and public demonstrations that finally won him the Presidency once again.
- **The Lula who arrives at the Planalto Palace is one who shows a moderate profile.** A key to his victory had to do with the building of a coalition with center spaces that began with the election of Alckim as his running mate and the strong support he had from Simone Tebet (MDB) in the second part of the campaign. This consensus building will have to be replicated in his mandate if he intends to achieve concrete advancements in his government plan. It is yet to be seen the definition of his cabinet where there will probably be familiar faces such as Fernando Haddad but also representatives of other spaces that indicate an effective coalition with more ideologically distant sectors.
- **Despite the defeat, Bolsonaro's electoral performance in both rounds demonstrates his consolidation as an inescapable figure in Brazil's political scenario.** Although at the moment he did not comment on the result, the support he obtained, together with the subnational territories that will be governed by his allies and his legislative benches, will give him a place of relevance as a possible leader of the opposition to Lula's government.
- **Congress is an area where Lula will certainly need to create important alliances for his government to be able to make his proposals and public policies effective.** The most challenging chamber will be the Senate, where there is a greater chance of encountering an opposition that is less willing to make agreements.

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