

Lula's reelection in Brazil: A vote against fascism sets stage for an eruption of class struggle

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Luiz Inácio Lula da Silva of the Workers Party (PT) won an unprecedented fourth term as president of Brazil on Sunday, October 25. With 51.79 percent of the valid votes, against 48.21 percent for Senator Flávio Bolsonaro of the Liberal Party (PL), Lula reversed the result of the first round, in which Flávio had won 47 percent to 45.2 percent. Abstention, which in the first round had been the highest since 1998, fell to the lowest in two decades, and blank and spoiled ballots reached a historic low.

Lula's reelection was driven by a broad-based hostility to a return to power by the Bolsonaros, whose campaign exuded the unmistakable stench of fascism. The weeks leading up to the runoff were marked by massive demonstrations in the country's main cities, motivated by a repudiation of the prospect of a government headed by the son and direct representative of Jair Bolsonaro—imprisoned for conspiring to carry out a fascist coup in 2022–2023—and subordinated to Washington's imperialist agenda.

This setback for the far right triggered declarations from political organizations supporting Lula that the country had been pulled back from the abyss. Vice President Geraldo Alckmin, former governor of São Paulo for the right-wing Brazilian Social Democracy Party (PSDB), provided the formula, declaring that Lula had “for the second time, saved Brazilian democracy.”

This political complacency is fed by the pseudo-left, which celebrates the victory as heralding a new flowering of reformism in Brazil and the world. *Jacobin* magazine, the organ of the Democratic Socialists of America (DSA), hailed it as “a beam of hope in a dark world.” These readings are as unrealistic as they are disorienting for the working class and youth in Brazil and internationally, who find themselves in direct confrontation with a world capitalist system in its death agony.

That same night, Flávio declared that he did not recognize the result and would seek its annulment. The following day, US President Donald Trump said the vote “looked like another rigged election.” The financial markets, for their part, are already demanding from the newly elected government of the Frente Ampla (Broad Front)—the coalition that brings together the PT and parties of the traditional right—a rapid introduction of the fiscal assault that it is preparing to carry out. Lula's reelection opens a period of intensified class struggle, in which the aspirations of the workers and young people who voted for him will collide head-on with his government's capitalist program.

The turnaround and the crisis of the PT

Until a few weeks ago, bourgeois analysts and Trump's supporters were celebrating the rise of a “blue wave” in Latin America—a supposed rightward shift of the population, expressed in the rise of fascistic governments integrated into Washington's “Shield of the Americas.” This fraudulent thesis is being refuted by an eruption of social rebellion against these governments and their programs of capitalist austerity. Virtually all of them have roughly the same abysmal approval ratings as their patron in Washington, Donald Trump. The defeat of Flávio Bolsonaro is yet another demonstration of the bankruptcy of the far-right network promoted directly by US imperialism in the region.

But this does not mean that the victory of the PT and its Frente Ampla “halted the region's right-wing wave,” as CNN emblematically put it.

The crisis of the PT and of the bourgeois nationalist governments of the Latin American Pink Tide as a whole is an irreversible historical process. Flávio's lead in the first round, the margin of less than four points in the second, and the advance of Bolsonaro's PL, which became the largest bloc in Congress and won governorships, including those of Rio de Janeiro, Rio Grande do Sul and Santa Catarina, represent an irreparable defeat for the perspectives of the PT and of the pseudo-lefts that support it.

The dead end confronting the PT is an expression of the crisis of the entire Brazilian bourgeois regime that has given rise to the threat of fascism and dictatorship. Over three terms of Lula (2003–2010 and 2023–2026) and one and a half of Dilma Rousseff (2011–2016), the PT faithfully administered the interests of capital. A fourth term will not interrupt this process but deepen it. By continuing to play its role as guarantor of the bourgeois order in crisis—implementing capital's demands for attacks and seeking an accommodation with the far right—the Frente Ampla government will feed its own crisis and nourish the fascist threat.

The coup threat and US imperialism

The Bolsonaros, in collusion with Washington, are already moving to continue the coup conspiracy. On Sunday night, Flávio declared that “it is impossible to recognize the result of the elections in the context in which things happened” and announced that he will demand the annulment of the results.

His pretext is the decision by Supreme Federal Court (STF) Justice Cristiano Zanin to extend voting until 7:00 p.m., following reports of buses being taken off the streets in several cities to prevent voters from reaching the polls. The argument is absurd. The extension, which was

even requested by Bolsonaro's own campaign, could never explain a difference of 4.4 million votes. The claims, like Trump's nonsensical allegations of a "stolen" 2020 election in the US, are not aimed at proving any fraud but at providing the political pretext for a coup.

The White House's official silence was broken Monday afternoon by Trump's own endorsement of the Bolsonaros' coup thesis. He told reporters: "I didn't take sides, but it looked like another rigged election. Elections have to be indisputable, and it looked very bad to me."

Eduardo Bolsonaro, Flávio's brother, released a video in English in which he called the election "clearly fraudulent" and appealed to foreign governments: "Don't recognize these elections." Eduardo lives in the United States, from where he has been coordinating the activities of Brazilian fascists in direct collaboration with the Trump administration. On the eve of the vote, he had already sown the fraud narrative and argued that, if defeated, his brother should leave the country, as Jair Bolsonaro did in the days before the January 8, 2023 attack.

The solution to an electoral defeat, Eduardo said in the same podcast interview, would be to "send in the Marines"—that is, a US military intervention. The formula directly evokes the US military operation that kidnapped Maduro in Caracas in January.

The verdict of capital

The millions who voted for Lula to stop fascism expect from the new government a social and political agenda that is directly at odds with the real interests that will determine the policies of his fourth term. Finance capital presented its demands as soon as the markets opened on Monday. In response to the election results, the dollar jumped 8.65 percent to 5.42 reais, and the São Paulo Stock Exchange futures index plunged 15 percent, triggering the circuit breaker that automatically halts trading. With future interest rates soaring, the National Treasury canceled the auctions of fixed-rate and inflation-linked bonds scheduled for the week.

The markets had openly bet on Flávio and on his *tesouração* (sweeping spending cuts) inspired by Milei's "chainsaw." After the first round, the Ibovespa rose 7.7 percent in a single session. Monday's reaction is a political ultimatum to the Lula government, that it must prove that it is capable of imposing upon the working class the same program of cuts the bourgeoisie expected from Flávio.

Analysts at the British bank Barclays listed the signals they are waiting for, including the choice of finance minister, the 2027 fiscal target and the cost of the campaign promises—the increase in the Bolsa Família cash-transfer program, the 5,000-real Pix payment for micro-entrepreneurs, free bus fares on weekends and the exemption from the federal tax on gasoline—which, according to *Estadão*, will require cuts of at least 39.8 billion reais in the 2027 budget.

Lula's campaign had already made its orientation clear by presenting Alckmin as the man who understands fiscal adjustment and by including in its government program an expression absent in 2022, "fiscal responsibility." The first moves toward forming the new cabinet confirm this. According to *Correio Braziliense*, Alckmin is the leading candidate for finance minister, in order to "win back the sympathy of Faria Lima"—São Paulo's Wall Street—"which threw itself headlong into Flávio Bolsonaro's campaign."

The PT's record leaves no doubt about the response the party is preparing. In October 2014, Dilma Rousseff was reelected with 51.64 percent of the vote and, a month later, handed the Finance Ministry to Joaquim Levy, an executive of Bradesco bank. As the WSWS wrote at the time, "With Rousseff and the ruling Workers Party (PT) having waged an election campaign warning that the victory of her opponent, Aécio Neves

(Social Democracy Party—PSDB), would mean turning over the country's economy to the bankers and a return to the policies of a dozen years ago, before the PT first came to power, the irony was lost on no one." The austerity program deepened the recession, demoralized the PT's social base and paved the way for the 2016 impeachment and, later, for Bolsonaro's election. The situation Lula faces today is similar, but far more acute.

In his victory speech on Sunday night, Lula rejected the idea that he would have difficulty governing with a "more conservative" Congress: "I didn't choose Congress, the people chose it, and it is with Congress that I will work and pass things." More than recognizing the formal legitimacy of the elected legislators, the statement fraudulently presents the reactionary character of Congress as a genuine expression of popular aspirations and signals that the government will subordinate itself to its right-wing agenda.

In the same speech, Lula announced that the federal government will "step into" public security, with the slogan that marked his rightward turn in the runoff: "For working people, we will give protection. For the criminal, we will give prison." This agenda points to the strengthening of a repressive apparatus that will inevitably be turned against the working class and all social opposition. The PT's pretension of wrenching the anti-crime banner from the hands of the far right by brandishing it as its own serves only to legitimize it. It paves the way for these forces and for US imperialism, which uses the fraudulent narrative of the "fight against narco-terrorism," to justify its intervention in Latin America.

The pseudo-left and the coming class struggle

The great danger of the situation is that growing opposition to fascism, imperialism and capitalism will be channeled into support for a bourgeois government. This government has implemented, and will continue to implement, capital's austerity dictates, the promotion of the military and accommodation to the imperialist order. This is precisely the role of the pseudo-left and, above all, of the political forces that present themselves as revolutionary, such as the Morenites who advocated "critical support" for Lula's Frente Ampla in the runoff. These same forces are now working to contain the class struggle that is on the agenda through a policy of pressure on the newly elected government.

This policy was formulated bluntly by the main leaders of Argentina's Socialist Workers Party (PTS), the party that leads the Permanent Revolution Current (CRP)—the Morenito tendency to which the Revolutionary Workers Movement (MRT) in Brazil belongs. Deputy Nicolás del Caño proclaimed that "the joy of a large part of the Brazilian people has to be transformed into an independent mobilization to sweep away from Brazil and the whole continent the plans of imperialism, big business and the ultra-right." His fellow deputy Myriam Bregman specified the content of this mobilization: "only a great struggle in the streets can defeat the reactionary reforms of Temer and Bolsonaro senior."

What the Morenites advocate is a program of pressure on the Frente Ampla government. Their horizon extends only as far as restoring the status quo prior to the PT's fall in 2016—that is, the very conditions that produced the current crisis. Extended to the continent, this perspective points to a revival of the Pink Tide as a response to the imperialist-backed far-right governments. What they fraudulently call an "independent mobilization" is a mobilization to bring back these bourgeois nationalist governments, with the perspective of pressuring them "to the left."

The Morenites also invoke the rebellion shaking France and Europe. For Bregman, Brazilian youth "can follow the path shown by the rebellion shaking Europe to defeat every policy of austerity and oppression." By

treating the reelection of the Frente Ampla as a step along the same path as France, they falsify two things at once: the significance of Lula's victory and the perspective of the international rebellion of youth and workers, which in France itself they are already trying to reduce to pressure on the unions, within a national and reformist movement.

Against these illusions, it must be stated clearly what lies ahead: an explosion of the class struggle. In Brazil, the workers and young people who voted for Lula hoping to improve their living conditions will collide with the austerity demanded by the markets and implemented by the Frente Ampla. Throughout Latin America, these struggles will confront both the fascistic far-right regimes of the Milei type and "pink" bourgeois governments such as Lula's, as part of the global rebellion against war and austerity that stretches from France, Greece and Italy to Chile and Mexico.

The decisive task is to forge the political independence of the working class from all factions of the bourgeoisie, unite its struggles internationally and arm them with a socialist program. This is the perspective fought for by the Socialist Equality Group in Brazil, together with the International Committee of the Fourth International.



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