

SPECIAL REPORT

UNTAPPED POTENTIAL: THE EVOLUTION OF COLOMBIA-BRAZIL RELATIONS

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EXECUTIVE SUMMARY

The Colombia–Brazil relationship stands at a pivotal crossroads. For decades, the bilateral relationship has been marked by limited prioritization, institutional constraints, and divergent strategic outlooks. This pattern has contributed to persistent underperformance, leaving key areas of cooperation underdeveloped. The current geopolitical moment presents a rare opportunity for both countries to recalibrate their partnership and position it as a regional benchmark for bilateral collaboration.

Amazon governance, border security, and defense cooperation have emerged as the most likely areas to generate near-term progress. Joint initiatives on sustainable bioeconomy models, combined with the use of advanced [geospatial tools](#), are enabling both countries to [combat](#) transnational crime while attracting investment. Colombia's modernization of its Aerospace Force and complementary defense-industrial opportunities with Brazil reinforce the potential for structured, long-term defense and economic collaboration.

Still, significant constraints persist. The crisis in Venezuela remains a bilateral thorn, with initial normalization efforts under President Gustavo Petro and President Luiz Inácio Lula da Silva faltering amid Nicolás Maduro's consolidation of power and resulting in a managed containment approach. Multilateral forums have also underdelivered, constrained by ideological divergences, weak institutionalism, and external dependencies. Without targeted reforms, these mechanisms are unlikely to generate meaningful bilateral alignment.

Amid an increasingly volatile global environment, both countries are adjusting their foreign policy strategies to navigate a complex global order. China's growing influence in the region, U.S. unilateralism, ideological tensions, and an abrupt retreat in its regional soft power have further spurred Colombia's increasing trend to pursue a foreign policy strategy of "strategic ambiguity," as defined by previous Colombia Risk Analysis reports. Under President Petro, Colombia has continued to diversify partnerships and further engage with multipolar Chinese-backed institutions, while ultimately holding off on BRICS membership. In theory, this puts Brazil in a priority position of the current government's strategy of regionalization and south-south collaboration. Although the government seems to recognize this, inefficiencies in its foreign policy leadership, a lack of implementation, and divergent personalities threaten to derail these efforts.

Our sources described President Petro's diversification strategy as haphazard, reactive, and lacking a coherent long-term vision. Decisions have often been driven by immediate political considerations rather than a calibrated roadmap, leaving Colombia without the institutional preparation or policy depth needed to navigate a more contested multipolar environment. By contrast, Brazil has cemented nonalignment as a central pillar of its foreign policy, avoiding overreliance on any single partner while expanding its multilateral ties, weaving a delicate balance between the U.S.-China rivalry. Yet, the Trump Administration's [aggressive](#) reliance on leveraging economic coercion to achieve favorable economic and [political](#) outcomes is testing this posture.

A more effective long-term foreign policy approach from the Colombian Government is expected to be calibrated, deliberate, and insulated from short-term political cycles (such as elections). This strategy involves sustained investments in institutional capacity, bureaucratic expertise, technical capabilities, and regulatory consistency, alongside the gradual development of cultural and diplomatic infrastructure capable of managing expanded partnerships without straining traditional alliances or trade partnerships. When executed in this manner, diversification is highly likely to create stronger incentives for bilateral integration, prioritizing the strengthening of commercial partnerships and harmonizing regulatory frameworks to facilitate cross-border trade and investment.



Internally in both countries, as the elections approach, political uncertainty is mounting. Colombia faces institutional volatility, political fragmentation, and a deteriorating security environment. Brazil faces its own legitimacy challenges, shaped by uncertainty surrounding President Luiz Inácio Lula da Silva's reelection prospects, the absence of a clear leftist successor, and a divided conservative bloc following the disqualification of Jair Bolsonaro. The 2026 elections in Colombia and Brazil are highly likely to influence the short-term trajectory of the bilateral relationship and the countries' strategic outlooks. We anticipate four scenarios in order of likelihood.

Scenario	Steady Pragmatic Cooperation (Most likely)	Center -Right Conservative convergence (Somewhat likely)	Center-Left Progressive convergence (Low likelihood)	Ideological Divide Bilateral Drift (Very low likelihood)
Development	Moderate leaders in both countries will likely drive incremental, institutionalized diversification.	Both governments will likely shift toward the U.S. and engage on more ideological shared interests, including border security, and a coordinated hard stance on Venezuela.	Left-aligned administrations will likely continue to prioritize areas of the bilateral relationship of more ideological interest, such as the Amazon, regional economic integration, and pushing for more deliberate use of multilateral institutions.	Highly ideological, divergent presidents in both countries will likely obstruct all aspects of engagement, potentially affecting the cordiality and symbolism of the bilateral relationship, turning to inflammatory accusations and the politicization of regional forums.
Impacts	Integration will likely expand, especially in areas of the lowest retaliatory pressure from the U.S.	Colombia is likely to pivot away from multipolar institutions and prioritize more partisan forums that are aligned with U.S. interests.	It is likely that Colombia will continue its trend of strategic ambiguity and engage with Brazil in multipolar institutions such as the BRICS and regional infrastructure projects.	It is likely that the foreign policy visions continue to diverge, and regional integration becomes increasingly constrained.



Across all scenarios, **this report concludes that unlocking the untapped potential of the bilateral relationship will require a deliberate shift from personality-driven diplomacy to institutionalized coordination. The path toward sustained cooperation will more likely advance during periods of political alignment and a shared consensus of priorities.**

The bilateral relationship stands at a pivotal moment. The intersection of geopolitical realignment and domestic leadership changes presents a genuine opportunity to catalyze the bilateral relationship. With the proper institutional mechanisms and leadership commitments, Colombia and Brazil have the potential to move the bilateral relationship from a symbolic friendship to a strategic and institutionalized partnership.

By integrating risk forecasting, firsthand interviews, and reinforced by this report, it equips policymakers, investors, and regional stakeholders with the tools to understand and respond to a rapidly shifting regional environment.

This report is part of a broader series by Colombia Risk Analysis examining Colombia's relations with [China](#), [India](#), [Russia](#), and Brazil. It concludes our series on the BRICS, as we do not plan to write a report on Colombia's relationship to South Africa.



INTRODUCTION:

Despite recurring symbolism of engagement over the decades, the Colombia-Brazil partnership has fallen short of its potential, marked more by symbolic diplomacy than by sustained institutional depth. Analysts often characterize this dynamic as one of **“a symbolic partnership,” defined by stable, friendly rhetoric but an enduring inability to convert goodwill into structured cooperation or long-term policy alignment.**

In the absence of major diplomatic disputes, relations have remained stable, but have bred a complacency that overlooks the immense potential of their partnership. Both countries have historically prioritized other external relationships outside of Latin America, resulting in low institutional investment and limited strategic coordination. Despite geographic proximity and few contentious diplomatic episodes, meaningful bilateral integration has been repeatedly sidelined in favor of more urgent political and economic agendas.

This report begins by tracing the evolution of Colombia–Brazil relations from the early 2000s to the present, mapping the gradual construction of bilateral architecture through successive administrations. Starting with the Uribe–Lula period, it outlines how, despite ideological divergence, both countries achieved pragmatic cooperation in trade and investment liberalization. Subsequent leadership cycles built modestly on this foundation, particularly during the Santos administration, which expanded multilateral and environmental collaboration. However, these efforts still failed to institutionalize cooperation on key issues above a superficial and rhetorical level.

The analysis then assesses the current state of bilateral relations under the Petro and Lula administrations. It offers a comprehensive overview of engagement on pressing concerns of the bilateral relationship, including the Amazon, border security, defense, and trade, where incremental improvements continue, but there continues to be a lack of institutional follow-through necessary to drive transformation. Drawing on expert interviews, the report identifies the main barriers to deeper cooperation: persistent instability in Venezuela, personality and leadership style rifts between President Petro and President Lula, and structural and bureaucratic constraints that are more problematic within Colombia.

The report examines how shifting geopolitical conditions are reshaping the strategic calculus of both countries. China’s expanding institutional footprint and the United States’ more unilateral posture under the second Trump administration have accelerated Colombia’s engagement with multipolar platforms, including its entry into the Belt and Road Initiative (BRI), the New Development Bank (NDB), and the Asian Infrastructure Investment Bank (AIIB), while ultimately stopping short of BRICS membership. The return of President Trump and his protectionist trade measures have raised the geopolitical cost of diversification for Colombia and Brazil. Tariffs, diplomatic ruptures, and sanctions have escalated tensions, forcing both countries to navigate the U.S.-China rivalry to avoid retaliation. Brazil’s nonalignment is being tested, while Colombia’s asymmetry makes it particularly vulnerable.

Our interviewees and research suggest that the future trajectory of Colombia–Brazil relations will hinge on domestic 2026 electoral outcomes in both countries, their leadership’s foreign policy vision, and their capacity to institutionalize cooperation within an increasingly volatile geopolitical environment.

Ultimately, this report diagnoses the structural barriers that have constrained the Colombia–Brazil relationship and assesses the shifting domestic and external forces reshaping bilateral engagement. It also spotlights how dual pressures of U.S. unilateralism and China’s institutional expansion are testing both countries’ diversification strategies.



METHODOLOGY

This report draws on insights from over 25 expert interviews conducted with individuals from across government, academia, and the private sector in Colombia, Brazil, and the United States. These conversations provided firsthand perspectives on the political, economic, and institutional dynamics shaping the bilateral relationship.

Additionally, we consulted a wide range of secondary sources to support and contextualize the interview findings. Key data sources included the Observatory of Economic Complexity (OEC), Colombia's Administrative Department of National Statistics (DANE), UN Comtrade, the World Integrated Trade Solution (WITS), as well as academic publications, news articles, policy briefs, and institutional reports.

These inputs were cross-referenced with Colombia Risk Analysis' proprietary knowledge base. All interviews were conducted on a non-attribution basis to encourage frank and open dialogue. We are grateful to those who contributed their time and expertise to this analysis.



EVOLUTION OF COLOMBIA–BRAZIL RELATIONS

ORIGINS OF BILATERAL ARCHITECTURE

Despite more than a century of formal diplomatic ties, the [relationship](#) between Colombia and Brazil has remained largely unexplored and far from reaching its full potential. The [1907 Vásquez Cobo–Martins Treaty](#) marked the formal establishment of relations, setting a 1,644 km border along the Amazon that has helped both countries avoid territorial disputes and sustained periods of tension. At the same time, this geography has acted as a barrier to deeper integration. The dense and remote expanse of the Amazon has limited the development of cross-border cultural and economic linkages, preventing the emergence of more interconnected regional communities.

Cultural divergence has further complicated integration. Colombia and Brazil were colonized by different European empires and are divided by language, with Brazil remaining the only Portuguese-speaking country in Latin America. These factors, combined with Brazil's structural self-sufficiency and both countries' frequent periods of domestic instability throughout the 20th century, contributed to a pattern of political disengagement and limited bilateral appetite.

However, the early 2000s marked the beginning of a modest but meaningful shift. As regional and global dynamics evolved, so too did the bilateral architecture. From this period onward, Colombia and Brazil started laying the groundwork for more structured cooperation, particularly in trade, security, and increased participation in multilateral forums. Yet despite these advances, the partnership continues to suffer from a lack of sustained prioritization and the strategic depth necessary to elevate it beyond surface-level alignment.



URIBE-LULA (2002-2010)

IDEOLOGICAL DIVERGENCE, PRAGMATIC BEGINNINGS

While the structural, geographical, and historical constraints contributed to a passive and overlooked bilateral relationship, the early 2000s marked a turning point towards pragmatic engagement. Colombia and Brazil became more conscious of the untapped potential of strengthening their bilateral ties, and there became more of a concerted effort to engage and deepen bilateral cooperation.

Álvaro Uribe's presidency was defined by an aggressive internal security strategy, heavily backed by the United States through [Plan Colombia](#). His administration prioritized militarized crackdowns on guerrilla groups, with foreign policy largely oriented toward securing U.S. assistance and reinforcing bilateral defense cooperation with Washington. Luis Inácio Lula da Silva, on the other hand, advanced a vision rooted in regional integration and South–South cooperation, remaining skeptical of U.S. intervention and its true intentions within the region. Despite stark differences in ideology, institutional priorities, and strategic worldviews, both leaders managed to identify areas of common interest, particularly through pragmatic economic diplomacy.

One of the most significant advances in Colombia–Brazil economic cooperation under Uribe and Lula was the ratification of the [Economic Complementation Agreement No. 59 \(ACE No. 59\)](#) in 2005. This pact expanded tariff liberalization between Colombia and MERCOSUR and laid the groundwork for broader integration between CAN and MERCOSUR members. This momentum was reinforced by the 2008 [Brazil–Colombia: New Business Frontiers](#) summit in Bogotá and Uribe’s 2009 state [visit](#) to Brasília, decisions that established the initial foundations for structured bilateral engagement and opened new channels for trade and investment. However, trust was strained by Colombia’s 2008 cross-border raid into Ecuador ([Operation Fénix](#)). Tensions deepened in [October](#) 2009 when the United States and Colombia signed the [Defense Cooperation Agreement \(DCA\)](#), which granted U.S. forces access to [seven](#) Colombian military bases. The accord intensified concerns in Brasília about Bogotá’s reliance on Washington and constrained the prospects for deeper security coordination, though it did not halt the broader trajectory of bilateral engagement.

The Uribe–Lula period serves as a pivotal reference point in the bilateral relationship. According to one high-level academic source consulted for this report, economic pragmatism transcended ideological rifts and laid a critical foundation for more comprehensive engagement under future administrations.



SANTOS-LULA (2010-2011): MULTILATERAL AWAKENING

Juan Manuel Santos’ presidency marked a [deliberate departure](#) from the heavily securitized foreign policy that defined the Uribe era. Santos recalibrated Colombia’s international strategy to prioritize cooperation, multilateralism, and regional reintegration. This pivot helped reduce strategic mistrust among neighboring countries and created space for a more comprehensive and balanced engagement with Brazil. The tone for this reorientation was established early.

During his 2010 state visit to Brasília, Santos signed [eight cooperation agreements](#) with the Brazilian government covering border development, trade, environmental protection, infrastructure, agriculture, scientific research, and security coordination. These accords facilitated labor and residential mobility between the Amazonian cities of Leticia and Tabatinga, expanded educational exchange programs, and launched joint operations to combat transnational crime.

Santos also sought to signal Colombia’s strategic autonomy by [cancelling](#) the controversial U.S. military base agreement and [restoring diplomatic relations](#) with Venezuela and Ecuador. These moves were viewed favorably in Brasília and helped restore confidence in Colombia’s regional diplomacy. Brazil, in turn, [deepened its involvement in Colombia’s peace process](#). Dozens of Brazilian military officers were deployed to support post-conflict monitoring, training, and advisory missions across the country, including efforts to facilitate dialogue with the National Liberation Army (ELN).



SANTOS-DILMA/TEMER (2011-2018): HOW BRAZIL'S DOMESTIC CRISES STALLED MOMENTUM

Lula left office in 2011 with high approval ratings and an evident regional leadership legacy. His successor, Dilma Rousseff, won the 2010 election and inherited much of Lula's foreign policy framework.

However, Brazil's capacity to sustain its regional influence and build on bilateral momentum evaporated as internal turmoil forced the country to turn inward. Overlapping political and economic crises severely undermined domestic confidence and, consequently, undercut its credibility on the international stage. Brazil's GDP growth [plummeted](#) from 7.5% in 2010 to near stagnation by 2014 and a [contraction of 8.2% in 2015-2016](#). At the same time, the country was consumed by the massive [Petrobras corruption scandal](#) (Lava Jato), fiscal mismanagement, and a prolonged recession. These crises eroded Rousseff's legitimacy, leading to impeachment proceedings that culminated in her removal from office in 2016.

Michel Temer assumed the presidency to complete Rousseff's term at a time of profound public disillusionment and widespread institutional fatigue. Domestic stabilization took priority, and deprioritized Brazil's once-assertive regional agenda. As a result, Brasília's capacity to project influence beyond its borders diminished significantly, weakening its traditional role as a regional anchor.

While the Santos administration remained committed to strengthening bilateral ties, Brazil's deepening internal crisis significantly constrained its ability to reciprocate. Multiple expert sources noted that the political and economic crises within Brazil created a vacuum in regional engagement, stalling promising initiatives despite Colombia's proactive outreach. Although both countries formalized collaborative frameworks during this period, the relationship experienced only modest growth, and much of its broader potential remained unrealized.



DUQUE-BOLSONARO (2018-2022): CONSTRAINED REALITIES

The presidencies of Iván Duque in Colombia and Jair Bolsonaro in Brazil were marked by ideological alignment and rhetorical cordiality. Yet beneath the surface, bilateral engagement remained constrained and largely stagnant. While both leaders projected a shared worldview, their inward-facing agendas and retreat of regional multilateralism ultimately limited sustained collaboration. Our academic sources emphasized that this period was shaped more by the weight of domestic crises and pandemic-related uncertainty than by any coherent bilateral strategy. Both governments struggled to manage internal instability, sidelining opportunities for meaningful engagement.

Duque's tenure marked a sharp pivot from Santos-era multilateralism, focusing on [security and counternarcotics](#) while reprioritizing its historical ties with the United States. Early moves included Colombia's [withdrawal](#) from UNASUR in 2018 and a complete diplomatic break with Venezuela, reversing prior [reconciliation efforts](#) during the [Santos administration](#). In Brazil, Bolsonaro's foreign policy [tarnished](#) the diplomatic standing built under Lula, withdrawing from UNASUR, promoting PROSUR, and openly siding with the West on highly politicized issues.

Nonetheless, relative ideological leanings and alignment with the United States helped ensure the cordiality between the two administrations. Duque's official visit to Brazil in 2021 exemplified this posture, culminating in the signing of [seven cooperation agreements](#) covering security, civil aviation, environmental protection, and sanitation. They also signed the [Leticia Pact](#) for the Amazon in 2019, a regional agreement aimed at improving environmental efforts, strengthening fire prevention systems, and enhancing sustainable development mechanisms within the Amazon basin. Despite these gestures, implementation remained limited. By the end of their terms, both countries had recorded [record](#) increases in deforestation, undermining their public commitments to environmental stewardship.

While the outbreak of COVID-19 compelled both countries to turn inward, several cross-border health initiatives underscored the value of cooperation. Along the shared Amazon border, Colombia and Brazil [established](#) binational sanitary surveillance rooms, promoted joint vaccine production capabilities, and launched programs to improve indigenous vaccination rates and health outcomes. This was embodied by a [joint vaccination campaign](#) and [Plan of Action](#) in April–May 2022 in the “triple border” region with Peru. Health authorities from both countries met in Leticia and Tabatinga to implement situational surveillance rooms that enabled data sharing and coordinated action. Notably, Colombia's Health Minister praised Leticia's residents during the campaign, as the city [achieved](#) one of the highest COVID-19 vaccination rates nationwide. Although these health initiatives demonstrated the potential of pragmatic cooperation, they remained efforts overshadowed by internal pressures.

Although Duque and Bolsonaro upheld the amicability of the bilateral relationship, tangible progress in the alliance remained limited. Domestic crises, the global pandemic, and a mutual withdrawal from multilateral engagement collectively stalled prior momentum. As a result, this period failed to consolidate or institutionalize meaningful collaboration. Rather than advancing the relationship, it reinforced a familiar pattern: rhetorical alignment without the policy substance or institutional commitment necessary for lasting strategic transformation.



PETRO-LULA (2023-PRESENT): IDEOLOGICAL SYMBOLISM. UNFULFILLED RHETORIC

The election of Colombia's first leftist president, Gustavo Petro, in 2022, alongside the return of Luiz Inácio Lula da Silva to Brazil's presidency in 2023, generated widespread [optimism](#) around the future of bilateral cooperation. On paper, the leaders' ideological alignment and mutual rhetorical commitments to climate action, regional integration, and South–South solidarity suggested a new era of strategic engagement that paved the way to a [deeper partnership](#) beyond cordiality. Despite the alignment in tone and political vision, tangible results have been limited. The following section examines how, despite the gradual gains in key areas of engagement, recurring execution gaps continue to hinder the emergence of a more strategic and resilient partnership.

OVERVIEW OF PRESENT-DAY BILATERAL RELATIONS

ENVIRONMENTAL COOPERATION AND AMAZON GOVERNANCE:

The Amazon basin offers a prime example of both the potential and the challenges in deepening Colombia–Brazil cooperation. One of the most visible early gestures was a high-profile meeting between the two presidents in the Colombian Amazon border town of [Leticia in July 2023](#), ahead of the Amazon Cooperation Treaty Organization (ACTO) Summit. The gathering reaffirmed the importance of indigenous rights and environmental stewardship while laying the groundwork for further regional cooperation. This meeting was followed by Lula’s official [visit to Bogotá in April 2024](#), which underscored the shared responsibility of environmental protection and the symbolic framing of the Amazon as a unifying bridge and strategic asset for bilateral engagement.

Our expert sources consistently identified deforestation as one of the few areas where Colombia and Brazil have demonstrated tangible progress and strategic alignment in recent years. [According](#) to Colombia’s Ministry of Environment and Sustainable Development, Colombia recorded a [33% reduction](#) in deforestation in the first quarter of 2025 compared to the same period in 2024, including a 54% drop within Amazon national parks. Brazil, likewise, saw a [32.4% decrease](#) in deforestation, as reported by MapBiomas, advancing President Lula’s broader initiative to achieve [zero deforestation](#) in the Amazon by 2030.

Private sector initiatives in Brazil and Colombia are aligning around sustainable Amazon development and the bioeconomy, presenting one of the most promising avenues for deeper bilateral engagement. In Brazil, [Natura](#), a cosmetics company working with 44 indigenous communities, has invested USD 100 million through the [Amazônia Viva Financing Mechanism](#), supporting 34 cooperatives and advancing non-extractive production across 3 million hectares of forest. At [COP16](#) in November 2024, Colombia advanced this agenda by launching the [Pan-Amazon Network for Bioeconomy](#) and formally endorsing Brazil’s Tropical Forest Finance Facility, a USD [125 billion](#) proposal to protect tropical and subtropical forests. While these initiatives remain in the early stages, their commercial viability and focus on conservation create a high-potential platform for sustained cooperation.

The Amazon and broader environmental cooperation will likely remain a strategic pillar of the Colombia–Brazil bilateral relationship. Our sources emphasized that this area holds the greatest untapped potential to catalyze deeper collaboration between the two countries. Provided that current investment flows and bilateral commitments are sustained, the Amazon is likely to remain a central tenet of sustained bilateral collaboration. However, the durability of these gains will certainly depend on both governments’ ability to institutionalize progress and manage competing domestic priorities. The upcoming [COP30](#) Conference in Belém will likely serve as a critical test of political will and a key indicator of whether Colombia and Brazil can formalize their environmental agenda into a credible framework for long-term cooperation.



SECURITY AND DEFENSE COOPERATION:

The shared border remains a hotspot for transnational organized crime. Illegal mining, drug trafficking, arms smuggling, and human trafficking have created a complex security environment that demands real-time coordination and sustained enforcement. According to a [2024 study](#) by the International Crisis Group, environmental sustainability in the Amazon cannot be meaningfully pursued without a parallel focus on security, given the expansion of organized criminal networks throughout protected and indigenous lands.

At the [Planet On the Road Conference](#) held in Bogotá in August 2024, representatives from Colombia's Air Force and Brazil's Federal Police met to explore how public-private partnerships with geospatial technology firms can enhance enforcement capacity. Colombian firm [Procalculo](#) and Brazilian company [SCCON](#) have helped both governments deploy satellite imagery and artificial intelligence to monitor high-risk zones, enabling early detection of illicit activities. Brazil's MAIS program, a collaboration between the Federal Police and geospatial firms, has recovered more than [USD 3 billion](#) since 2020 through fines, seizures, and asset freezes linked to illegal logging and mining.

Two major operations between Colombia and Brazil took place in June and July 2025 that reinforced these binational coordination efforts. The first major [operation](#) took place in the first week of June, as a joint military mission targeting illegal gold mining infrastructure along the Río Cotuhé, deep within the Tarapacá Indigenous Territory. The operation dismantled around [70](#) illegal gold mining sites, including [34](#) dredging platforms generating an estimated [USD 25 million](#) annually for notorious criminal organization networks, including [Comandos de la Frontera](#), [Comando Vermelho \(CV\)](#), and [Primeiro Comando da Capital \(PCC\)](#). Weeks later, [Operation Green Shield](#) mobilized over 1,500 personnel in more than 350 coordinated raids, seizing illicit assets worth [USD 64 million](#) and arresting [94](#) suspects. These actions signal that sustained binational coordination can yield high-impact results against transnational criminal networks and environmental crimes, reinforcing a security agenda that remains one of the most functional pillars of the bilateral relationship.

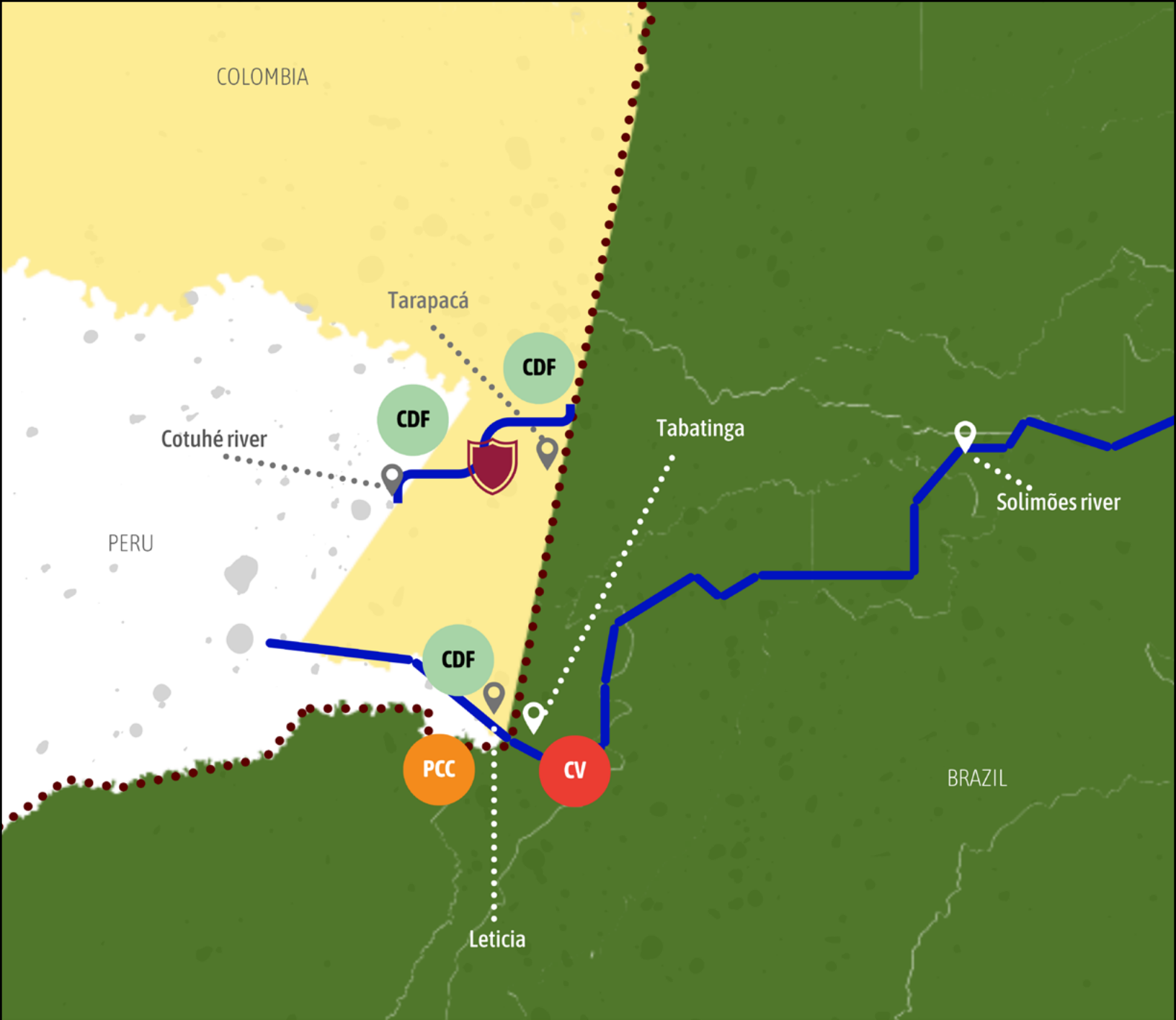
These operations reflect a growing shift toward technologically enabled and institutionalized security coordination between Colombia and Brazil. **Several expert sources emphasized that the effective integration of geospatial tools, real-time data sharing, and bilateral intelligence exchange is essential for developing a more proactive, intelligence-driven model of transnational environmental security.** This trend aligns with both countries' broader efforts to embed environmental governance within their national defense strategies in the Amazon.

Beyond ground operations on the border, defense cooperation between Colombia and Brazil has expanded into the military-industrial sphere. This trend aligns with Colombia's broader strategy to modernize its [Aerospace Force \(FAC\)](#) and enhance national defense capabilities. Experts consulted for this report emphasized that enhancing air mobility and logistical reach is widely seen as essential for addressing internal security threats, improving disaster response, and supporting peace-building efforts in remote regions. Brazilian counterparts view these modernization efforts positively, noting that they open new avenues for industrial collaboration and reflect complementary strategic goals across both defense sectors.

A recent development that reinforces this trajectory includes Colombia's finalization of a landmark agreement with Brazilian aerospace manufacturer [Embraer](#) to acquire [KC-390 Millennium](#) military transport aircraft. Although the sale has been announced in the media, according to our sources, no agreement has been reached to date¹. This acquisition is widely viewed as a strategic replacement for Colombia's aging fleet of Lockheed C-130H Hercules aircraft. Once completed, the deal is expected to significantly enhance Colombia's rapid deployment capability, particularly in remote and challenging regions like the Amazon.

1 An earlier version of this report suggested that Colombia had acquired three KC-390 aircraft from Brazil.





AMAZON BORDER SECURITY: ACTORS AND COOPERATION (2025)

Criminal Groups:

- Comandos de la Frontera (CDF)
- Comando Vermelho (CV)
- Primeiro Comando da Capital (PCC)

Major Operations:

- Operation on the Cotuhé River

Moreover, the Petro administration [announced](#) in early April its intention to acquire [16 Saab Gripen E/F fighter jets](#) from Sweden's aeromanufacturer [Saab](#), with the first units expected to become operational by [late 2026 or early 2027](#). Although officials have assured that the contract remains on schedule, no formal signing has been announced as of late September. Bosco da Costa Junior, CEO of Embraer, has [confirmed](#) the possibility of assembling Colombia's Gripen jets at Embraer's Gavião Peixoto plant in São Paulo. Brazil, the first Latin American country to operate the Gripen, has developed a warm and complementary relationship with its Swedish counterpart. Saab is interested in leveraging this existing assembly line to fulfill the Colombian order, which would optimize production costs, streamline logistics, and deepen regional defense-industrial ties.

At the same time, [concerns](#) persist about Colombia's overreliance on Brazil's production capabilities. Critics note that Brazil's own Gripen contract has faced extensive delays, with further apprehension about whether Brazil will prioritize Colombia's order over its own backlog. Despite these risks, the government highlights that this Gripen partnership also includes social investments in strategically significant regions in Colombia, which can further spur integration efforts beyond defense supply chains.

This growing alignment was further highlighted in [July 2025](#), when two Gripen F-39E jets from the Brazilian Air Force conducted a symbolic overflight of the Amazon en route to [F-AIR 2025](#), Colombia's premier aerospace exposition. Accompanied by a KC-390 providing logistical support, the demonstration drew over 58,000 attendees and more than 230 aerospace firms. Several weeks after the fair, the Colombian Aerospace Force (FAC) hosted a high-level visit from the Brazilian Air Force (FAB), which saw the signing of a [Protocol of Intent](#) to advance joint initiatives in space observation, communications technology, and other areas. The visit also led to the establishment of a [bilateral cooperation program](#) focused on simulation training and capacity-building. This includes joint exercises involving platforms such as the UH-60 Black Hawk and the C-295 transport aircraft, along with academic exchanges between military training schools and instructor exchanges for rotary-wing aviation.

These developments and the formalization of aircraft deals signal a more deliberate prioritization of defense cooperation. They reflect an intentional shift toward integrated supply chains and long-term interoperability, laying the groundwork for shared operational capabilities and mutual defense capacity-building.

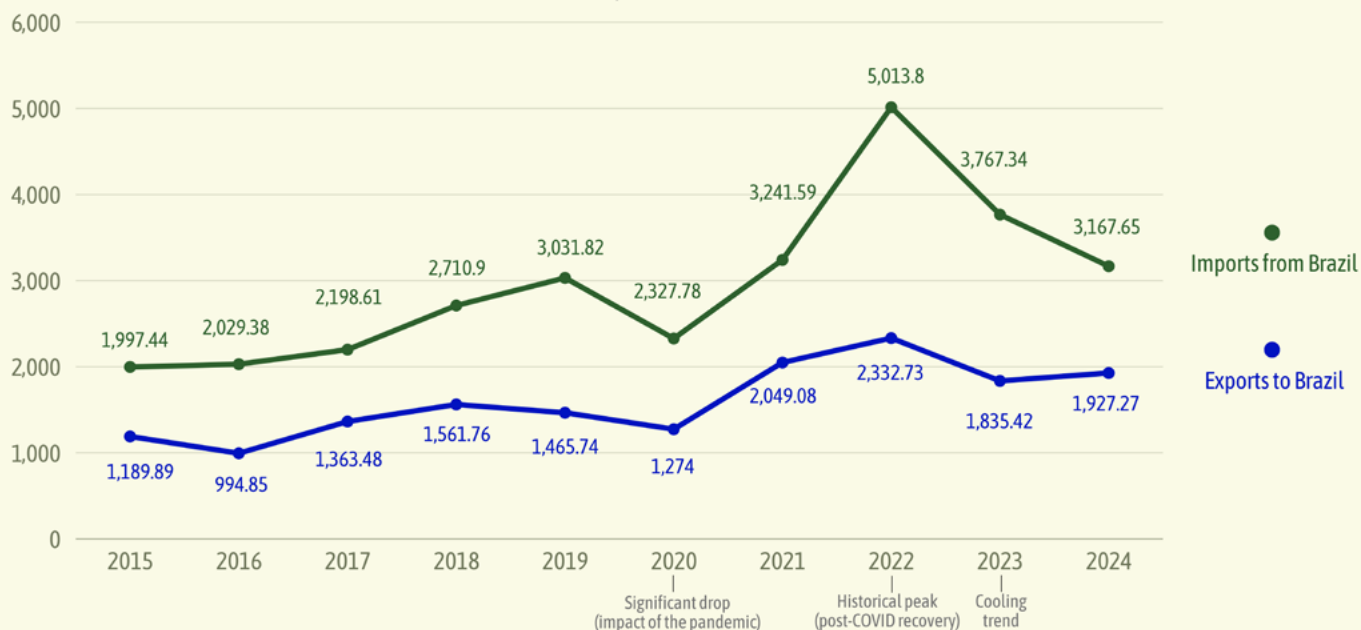
Border security will likely remain a top-tier agenda item in the bilateral relationship, particularly as both governments continue to confront the intertwined threats of organized crime, environmental degradation, and limited state presence in remote territories. Interviewees underscored that the long-term sustainability of these joint enforcement efforts will hinge on the ability of both governments to institutionalize real-time coordination mechanisms that are resilient to political transitions. Sustained progress will require the creation of formalized structures, clear mandates, and reliable funding streams to ensure continuity and strategic impact over time.



TRADE AND ECONOMIC DEPENDENCIES

BILATERAL TRADE EVOLUTION BRAZIL–COLOMBIA (2015–2024)

(FOB, MILLIONS USD)



Source: DIAN

COLOMBIA
RISK
ANALYSIS

Economic integration between Colombia and Brazil remains well below its potential. While the bilateral trade relationship is among the highest within South America, both countries continue to prioritize extra-regional markets, leaving regional commercial ties underdeveloped.

The trade volume graph below, based on data from [Colombia's Administrative Department of National Statistics \(DANE\)](#), visualizes this evolving relationship between 2015 and 2024 in Free on Board (FOB) USD terms. The DANE-based trade volume data shows a steady but modest expansion over the past decade, reinforcing the broader narrative of a relationship lacking institutional depth. The impact of the COVID-19 pandemic is clearly visible as a sharp contraction, followed by a post-pandemic peak in 2022. Despite the convergence of Petro and Lula's presidencies, this momentum was not sustained.

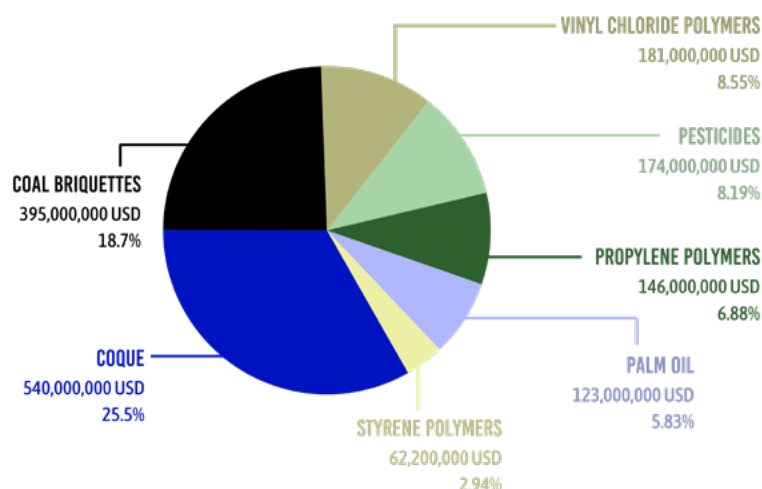
The composition of trade remains highly uneven both in value and product diversification. Based on the 2023 bilateral trade data from the [Observatory of Economic Complexity \(OEC\)](#), Brazil exported approximately USD 3.98 billion worth of goods to Colombia in 2023, while Colombia exported just USD 2.12 billion in return, resulting in a trade surplus of USD 1.86 billion in Brazil's favor. The charts highlight Brazil's broader export base, which includes high-volume agricultural and manufactured products such as corn (USD 512 million), cars (USD 464 million), and refined petroleum (USD 113 million). Meanwhile, Colombia's top exports to Brazil are heavily concentrated in extractive and raw material sectors, including coke fuel (USD 540 million), coal briquettes (USD 395 million), and palm oil (USD 123 million).



COLOMBIA–BRAZIL BILATERAL TRADE COMPOSITION

BASED ON TOP EXPORTS (2023)

→ EXPORTS FROM COLOMBIA TO BRAZIL (2023)



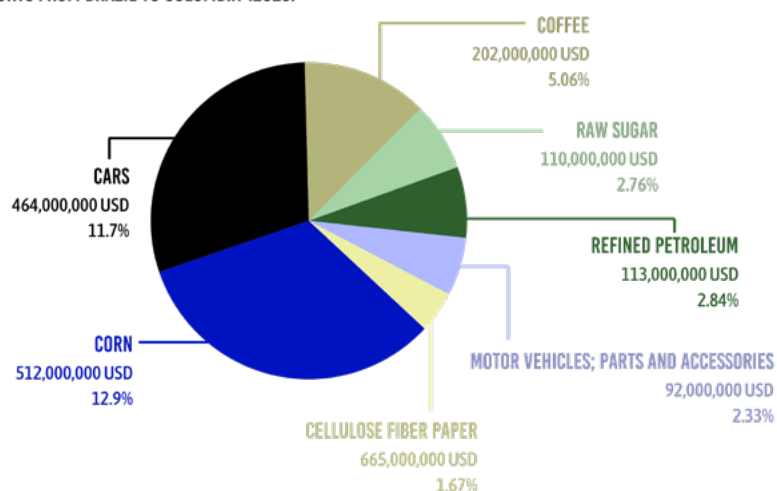
Source: OEC - Brasil-Colombia



COLOMBIA–BRAZIL BILATERAL TRADE COMPOSITION

BASED ON TOP EXPORTS (2023)

→ EXPORTS FROM BRAZIL TO COLOMBIA (2023)



Source: OEC - Brasil-Colombia



Our interviews with regional and economic experts emphasized that Colombia's narrow export base leaves it exposed to commodity price fluctuations and limits its ability to expand value-added trade with Brazil. In comparison, Brazil's integrated agri-industrial economy enables stronger export linkages both within the region and to global markets. The asymmetry is apparent: Brazil's diversified manufacturing base and stronger logistics infrastructure allow it to capture a larger share of bilateral trade. By contrast, Colombia's export profile is less industrially integrated, limiting its ability to compete in higher value-added sectors.

On a global scale, however, the bilateral trade relationship holds little relevance. Brazil ranked as Colombia's 7th export partner, capturing only 3.79% of Colombia's exports in 2023, which totaled USD 52.4 billion. Colombia ranked as Brazil's 19th biggest export partner, accounting for just 1.1% of its global exports, totalling USD 352 billion. This asymmetry is especially stark when contrasted with the scale of trade each country maintains with extra-regional powers. Colombia's exports to the United States reached USD 13.6 billion (26% of total exports), while Brazil's exports to China topped USD 105 billion (30% of total exports), highlighting the structural orientation of both economies toward markets outside the region.

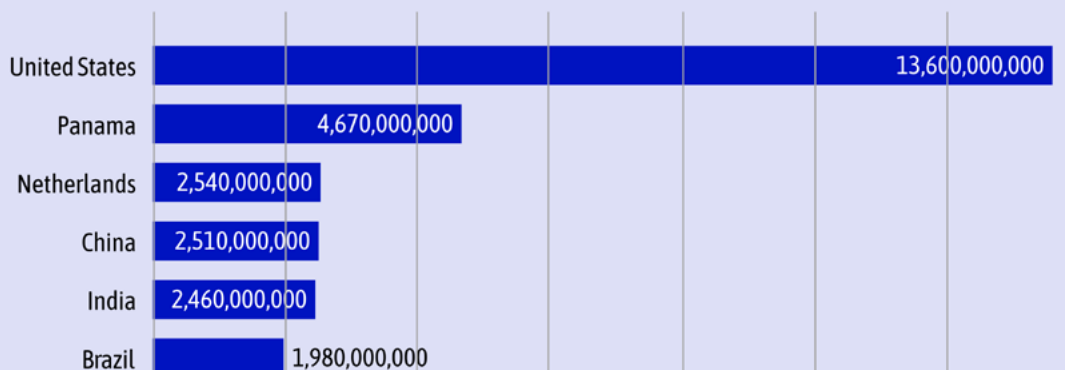
This disparity illustrates both the structural asymmetry of the relationship and the persistent prioritization of extra-regional trade. Such dynamics are not unique to Colombia and Brazil, but instead reflect a broader regional trend. **Sources we interviewed for this report emphasized that Latin American economies prioritize relationships with major global powers over those with neighboring countries. Intra-regional trade remains limited in scope, transactional in nature, and chronically underdeveloped. The absence of harmonized trade architecture and a lack of political commitment to regional industrial integration have stunted the emergence of durable, high-volume commerce within Latin America.**



TOP EXPORT DESTINATIONS OF COLOMBIA AND BRAZIL (2023)

TOP EXPORT DESTINATIONS OF COLOMBIA (2023)

USD



TOTAL EXPORTS: USD \$52.4B

TOP EXPORT DESTINATIONS OF BRAZIL (2023)

USD



TOTAL EXPORTS: USD \$352B

Source: OEC Col Inglés, OEC BR Inglés

COLOMBIA
RISK
ANALYSIS



REGULATORY BARRIERS TO BILATERAL INTEGRATION

One of the most notable constraints to deepening bilateral trade and investment is the [absence](#) of clear and standardized frameworks. This lack of regulatory uniformity contributes to operational uncertainty and discourages private sector investment in large-scale cross-border projects. Brazil's trade bureaucracy, described as [complex and challenging](#), operates within a more [established legal](#) and institutional framework. Colombia's trade governance, by contrast, is perceived by our sources as more fragmented, politically volatile, and less predictable in terms of enforcement. Colombia's internal delays and bureaucratic hurdles in ratifying key trade agreements already signed and finalized by Brazil illustrate this dynamic.

The [Economic Complementation Agreement No. 72 \(ACE-72\)](#) provides a clear example. Signed in 2017 as part of a Colombia–MERCOSUR accord, the agreement aimed to lower tariff barriers and establish a stronger commercial framework by eliminating tariffs on [97 percent](#) of product categories, including sensitive sectors. Brazil completed ratification swiftly after its signing, but Colombia only applied it [provisionally](#) and has yet to secure full Congressional approval. In 2024, Colombia [terminated](#) the automotive provision of ACE-72, which had allowed up to 50,000 Brazilian vehicles to enter on a duty-free basis annually. The decision has unsettled Brazilian automakers and [industry associations](#), which warned that the reversal undermines competitiveness. The termination is scheduled to take effect on October 13, with estimates that Brazilian auto imports could rise by nearly [30 percent](#).

The [Cooperation and Investment Facilitation Agreement \(CFIA\)](#) highlights a similar pattern. Signed in 2015 by both countries and ratified by Brazil in 2018, it remains [pending](#) finalization in Colombia. The CFIA was designed to strengthen investor protections, streamline dispute-prevention mechanisms, and provide a more predictable environment for cross-border investment. Yet without ratification, these guarantees remain on paper, leaving the private sector in both countries without the institutional support the accord was intended to deliver.

Taken together, the trajectory of ACE-72 and the CFIA demonstrates how Colombia's bureaucratic bottlenecks constrain deeper integration. Agreements are negotiated and signed, but too often remain diluted, provisionally applied, or stalled, leaving their intended benefits unrealized, creating uncertainty that undermines investor confidence and the credibility of future bilateral commitments.

At the same time, episodes of ad hoc coordination highlight the potential of what truly aligned frameworks could achieve. In [May 2025](#), a bird flu outbreak in Brazil prompted Colombian health authorities to suspend poultry imports. The [Colombian Agricultural Institute \(ICA\)](#) coordinated directly with Brazilian counterparts, exchanging technical data and enforcing sanitary protocols. This rapid response contained the disruption and allowed Colombia to assess risk exposure while ensuring compliance with national regulations and international standards. While effective in the short term, the episode underscored that cooperation relied on reactive measures rather than harmonized frameworks. It demonstrated the untapped potential for institutionalized alignment to create not only crisis management tools but also a more durable foundation for trade and health security.

Absent a prioritization of regulatory alignment, institutional commitments, and legislative follow-through, it is highly likely that Colombia–Brazil trade relations remain confined to incremental improvements rather than durable integration.



PARTICIPATION IN REGIONAL & MULTILATERAL FORUMS

ORGANIZATION	BRAZIL'S AFFILIATION	COLOMBIA'S AFFILIATION	YEAR OF FOUNDATION	NOTES
Amazon Cooperation Treaty Organization (ACTO)	Full Member	Full Member	1978	Promotes sustainable development, environmental protection, and cross-border cooperation among Amazon Basin countries.
Community of Latin American and Caribbean States (CELAC)	Full Member	Full Member	2010	Political and diplomatic forum for all Latin American and Caribbean states.
Organization of American States (OAS)	Full Member	Full Member	1948	Multilateral body advancing democracy, human rights, security cooperation, and regional dispute resolution across the Americas.
Union of South American Nations (UNASUR) — reactivation in process	Full Member*	Full Member	2008	Intended to deepen political, economic, and infrastructure integration in South America.
Latin American Integration Association (ALADI)	Full Member	Full Member	1980	Trade integration platform reducing tariffs and promoting regional commerce among Latin American countries.
Southern Common Market (MERCOSUR)	Full Member	Full Member	1991	Customs union and common market promoting free movement of goods, services, and factors of production among members.
Pacific Alliance	Not a Member	Full Member	2011	Regional integration initiative focused on trade liberalization, market integration, and cooperation among Pacific-oriented Latin American economies.
Andean Community (CAN)	Not a Member	Full Member	1969 (Cartagena Agreement)	Subregional bloc promoting economic integration, common regulations, and free trade among Andean countries.

Brazil and Colombia participate in an extensive network of multilateral and regional organizations, as depicted by the graph above. In theory, they present a comprehensive and diverse architecture where both countries can coordinate on policy initiatives, develop implementation frameworks, and exchange experience. In practice, however, our sources repeatedly underscored the structural and functional limitations of these platforms that have constrained their ability to generate substantive integration between Colombia and Brazil and the region more broadly.

KEY CONSTRAINTS TO EFFECTIVENESS:

Key constraints to effectiveness stem from a combination of **(1) ideological divergences, (2) institutional weaknesses, and (3) structural economic disparities**. Divergent national priorities, frequent leadership changes, and internal political crises have [hindered](#) consensus-building and the development of coordinated approaches, as exemplified by President Milei's sustained [threat](#) to [withdraw](#) from Mercosur and Uruguay's [decision](#) to pursue unilateral trade negotiations with China in November 2023. Weak institutional frameworks, a lack of binding agreements, and overextended agendas have led to symbolic declarations without actionable plans, as illustrated by the "[Brasília Consensus](#)" of 2023, which addressed over 30 issues but lacked credible implementation. These challenges are compounded by significant imbalances in economic scale, industrial capacity, and trade orientation across the region, as well as a persistent reliance on extra-regional markets, which creates uncertainty for the private sector when policy or trade dynamics shift. These overlapping constraints continue to limit the region's ability to move beyond rhetorical symbolism, weakening the effectiveness of multilateral platforms.

MINI CASE STUDY: ACTO CONFERENCE, BELÉM (AUGUST 2023)

The Amazon Cooperation Treaty Organization (ACTO) [summit](#) in Belém exemplifies how the governance styles between President Petro and President Lula and the institutional realities of both countries have limited greater bilateral cooperation efforts. The summit was initially framed as a landmark opportunity to align regional environmental goals. President Petro advocated for a sweeping [moratorium](#) on new fossil fuel exploration in the Amazon, seeking to embed ambitious climate leadership into regional discourse. President Lula, cognizant of balancing ideals with pragmatism, adopted a more tempered approach that emphasized gradual transition and national development needs. While the final declaration outlines [113](#) general objectives, it [failed](#) to incorporate any tangible or clear plan on benchmark targets or a timeline to halt deforestation or fossil fuel extraction. According to participants familiar with the summit's internal dynamics, the clash between Colombia's idealistic positioning and Brazil's interest-based calculus that pitted leaders into two camps was attributed to the lack of substantive and long-term measures. Since then, Brazil has advanced infrastructure initiatives through sensitive rainforest zones and [approved](#) offshore drilling projects near the Amazon's mouth, moves that further highlight the leader's [diverging perspectives](#) that have hindered greater bilateral action.



Our sources emphasized that the ACTO summit illustrates how ideological divergences and the absence of binding mechanisms prevent these platforms from delivering substantive outcomes. President Petro's uncompromising environmental stance and President Lula's gradual, pragmatic approach underscore that institutional mechanisms are lacking to ensure all parties can come to a compromise, ensuring follow-through. To date, these forums have functioned primarily as stages for rhetorical displays rather than engines for legislative alignment or deeper institutional integration. Without sustained political commitment, stronger institutional frameworks, enforceable targets, and a diversification strategy that reduces overreliance on any single external partner, these mechanisms are highly unlikely to drive meaningful Colombia–Brazil integration in the short term.

VENEZUELA AS A BILATERAL THORN

The political crisis in Venezuela remains a highly volatile and disruptive variable that continues to hinder the enhancement of bilateral cooperation between Colombia and Brazil. Our sources consistently identified Venezuela as a strategic impediment to unlocking further bilateral potential. While there is a broad consensus that resolving the crisis is essential for achieving regional stability, both governments have failed to develop a coordinated response that transcends administrations and ideological divisions.

In Colombia, President Petro's campaign promises to integrate Venezuelan migrants have not advanced and have [failed](#) to build on the legal frameworks needed for long-term inclusion. On the security front, the ELN, which has [suspended](#) peace talks since January 2025 with the Petro administration, continues to operate across the border with relative [impunity](#). In July 2025, Colombia and Venezuela signed a [Memorandum of Understanding \(MoU\)](#) to establish a [Binational Special Economic Zone](#). Despite the memorandum being non-binding, the initiative has faced intense political [backlash](#). In Brazil, relations with Caracas deteriorated after Maduro's threats to [annex](#) Guyana's Essequibo region. Nevertheless, President Lula has maintained selective cooperation grounded in economic pragmatism, including [USD 1.15 billion](#) in exports to Venezuela in 2023 and the [resumption](#) of electricity imports from the Guri dam. At the same time, it has also applied strategic pressure, most notably by [vetoing](#) Venezuela's BRICS membership in 2024.

Initial momentum toward pragmatic engagement emerged following the elections of President [Petro](#) and President [Lula](#). Both moved swiftly to reestablish diplomatic ties with Caracas, aiming to manage irregular migration, revitalize border commerce, and reduce friction in frontier zones. President Petro focused on improving Colombia's capacity to integrate over [2.8 million](#) Venezuelan migrants, which represents roughly 5% of the national population. Similarly, Brazil hosts over [650,000](#) Venezuelan migrants, where authorities have faced mounting budgetary and operational pressures following the [suspension](#) of U.S. aid that had underwritten key components of its migrant assistance programs previously.

However, these early gains in normalization quickly derailed following Venezuela's [2024 presidential elections](#), which were internationally condemned and [discredited](#) for lacking transparency and legitimacy. In response, Colombia, Brazil, and Mexico issued a [joint statement](#) in early August 2024, calling for democratic guarantees and renewed dialogue, but the initiative was ignored by Caracas and soon collapsed. According to several government officials interviewed for this report, President Petro's calls were ignored by the Maduro regime, and the international initiative was disregarded altogether. According to multiple sources, both countries now view the crisis as politically intractable and costly to deal with, resulting in a distancing from the issue. A high-level diplomatic official reiterated that change in Venezuela must come from Venezuela and should not be forced or engineered by outside forces.



THREAT OF U.S. INTERVENTION FURTHER COMPLICATES BILATERAL COORDINATION

Despite these warnings, tensions deepened in late August 2025 as the Trump administration escalated its maximum-pressure campaign on the Maduro regime. A [significant](#) U.S. naval buildup around Venezuela was accompanied by [three](#) lethal strikes on suspected “go-fast” boats, killing at least [17](#) alleged traffickers. Washington framed the actions as counter-narcotics operations vital to U.S. national security. Yet the scale and intensity of deployments sparked regional fears of broader [confrontation](#) and provoked legal and ethical debate over the use of military force against criminal groups in international waters.

Regional reactions converged on voicing [alarm](#) over U.S. military actions. As CELAC’s pro tempore chair, Petro issued a statement backed by a majority of members (nine of the 33 countries withheld support) reaffirming Latin America and the Caribbean as a zone of peace. He [denounced](#) the killings as “assassinations,” questioned the credibility of U.S. intelligence, and ruled out the use of Colombian territory for any operation against Venezuela. President Lula [expressed](#) similar concerns about destabilization but avoided inflammatory rhetoric, positioning Brazil as formally neutral while stressing dialogue and sovereignty. However, aside from symbolic alignment, there have been no accompanying joint policy initiatives to ease tensions. These dynamics highlight a familiar pattern: symbolic regional alignment without substantive follow-through. While CELAC and other forums may continue to produce declarations against intervention, neither Colombia nor Brazil has advanced concrete bilateral mechanisms to manage Venezuela’s spillover effects.

These dynamics signal that, absent a coordinated approach, Venezuela is highly likely to function as a managed liability throughout the remainder of the Petro and Lula administrations. The issue is likely to remain part of public discourse and influence electoral campaigns, but substantive bilateral coordination is bound to remain nonexistent. Without an internal political transition in Caracas, the probability of coordinated Colombia–Brazil engagement on the crisis remains highly unlikely. The initial assumption that diplomatic normalization would facilitate meaningful progress and move Venezuela closer to a democracy has eroded following the fraud on July 28, 2024. Additionally, in our assessment, the renewed threat of U.S. direct intervention is likely to catalyze regional coordination in condemning external interference. However, this alignment will remain symbolic unless paired with credible frameworks that reconcile border security, international law, and bilateral responsibilities.

For now, the normalization approach has failed to deliver concrete results, further underscoring the complexity of the Venezuelan issue and the uncertainty of how to move forward from a multilateral or bilateral perspective.

PERSONALITY RIFTS AND LACK OF INSTITUTIONAL COMMITMENT

A recurring theme across our sources is the pronounced divergence in leadership style and political temperament between Presidents Petro and Lula. The majority of our sources concluded that while ideological affinities initially raised expectations for closer bilateral coordination, personality differences, President Petro’s personal ambition, governance discipline, and foreign policy execution have hindered leadership synergy, ultimately limiting the momentum for deeper collaboration.



Observers widely see President Lula as a [pragmatic](#) and seasoned statesman. With a center-left coalition of over [10 parties](#), Lula prioritizes consensus-building and maintains cordial relations with both Brazil's private and public sectors, which has enabled him to navigate institutional constraints effectively. In contrast, many of our sources have characterized President Petro's governance as [impulsive](#), uncompromising, and short-sighted. His leadership style reflects that of a lifelong campaigner, more attuned to messaging and symbolism than administrative follow-through. Many observers attribute this style to the over [56](#) resignations of cabinet members and [126](#) vice ministers during his tenure.

Despite President Petro's campaign promise to [professionalize](#) Colombia's foreign service, numerous appointments have drawn criticism for continuing to [privilege](#) political loyalty over expertise and merit. Various [studies](#) conducted on the institutional capacity of foreign ministries within Latin America have concluded that Brazil's [Itamaraty](#) remains one of Latin America's most institutionalized and technically rigorous foreign ministries, which is confirmed by several comprehensive comparative [studies](#). **Our sources reinforced the notion that the contrast in bureaucratic stability and professionalization further complicates policy continuity and reduces the probability of sustained, high-level coordination between the two countries.**

This instability has spilled into the Ministry of Foreign Affairs. On July 4, [Laura Sarabia](#) resigned, becoming the third Foreign Minister to step down under President Petro. At the same time, Colombia's Ambassador to Brazil, Guillermo Rivera, [presented](#) his resignation effective July 31. Petro nominated Alfredo Rafael Saade as his replacement, but his [questionable](#) background and ongoing legal battles provoked public criticism and pressure, ultimately resulting in Saade's [refusal](#) to accept the nomination, leaving the ambassadorship [vacant](#) as of September 2025. Experts stress that these rapid changes and internal turmoil have weakened Colombia's diplomatic apparatus, resulting in inconsistent messaging and a fragmented foreign policy posture.

With less than a year to go until both countries' presidential elections, it is unlikely that Colombia and Brazil will realize the full potential of their partnership during the remainder of the Petro–Lula term. Bilateral progress is expected to remain concentrated in low-risk domains, with incremental cooperation on shared concerns and joint declarations that project symbolic solidarity. Substantive initiatives requiring policy alignment, regulatory harmonization, or sustained cross-ministerial engagement are likely to encounter persistent bureaucratic inertia and inattention. **The Petro–Lula leadership dynamic stands as a missed opportunity at a moment of heightened geopolitical competition, when deeper regional coordination and strategic commitment are essential for navigating a more contested multipolar order.**



EXTERNAL PRESSURES ON THE BILATERAL RELATIONSHIP

A NEW WORLD ORDER

The bilateral relationship between Colombia and Brazil comes at a defining moment amid a profound [reconfiguration](#) of the [international order](#). Since the early 1990s, Washington has exercised considerable influence over Latin America's political and economic landscape by championing neoliberal reforms and by embedding asymmetrical dependencies through mechanisms such as the [Washington Consensus](#).

The 21st century has brought a [significant shift](#) from this unipolar model. U.S. credibility has continued to [diminish](#) due to [prolonged interventionism](#), foreign policy blunders, and the growing [protectionist vision](#) that now dominates the “America First” foreign policy agenda during the Trump era. In parallel, [China's emergence](#) as a global economic and diplomatic actor has created viable [alternatives](#) for countries seeking greater autonomy. Governments across Latin America have responded to this shifting environment by recalibrating their foreign policy postures. Rather than abandoning traditional alliances, they are increasingly adopting strategies to diversify their partnerships while hedging against great power rivalries. At *Colombia Risk Analysis*, we define this foreign policy shift as [strategic ambiguity](#): a deliberate effort to reduce unilateral dependencies while maximizing the economic and political potential of emerging global partnerships.

Brazil has long been a frontrunner of this [approach](#). During President Lula's first term (2003–2010), Brazil helped co-found several multilateral groupings, including [IBSA](#) (2003), [UNASUR](#) (2008), and [BRICS](#) (2009). These platforms reinforced Brazil's identity as a champion of South–South diplomacy and enhanced its credibility as a neutral broker in global affairs. By expanding commercial ties with emerging economies and institutionalizing its presence in multilateralism, Brazil created policy space to maneuver amid [U.S.-China competition](#). While Jair Bolsonaro's administration marked an ideological retreat from Brazil's traditional multilateral role, our sources underscored that the country's institutional ties to China [did not change](#). Trade flows and investment channels remained open, and institutional linkages persisted, compelling a pragmatic approach amid ideological tensions, indicating that, despite inflammatory rhetoric, Bolsonaro was forced to devise a practical approach. Moreover, Brazil's strategy continues to gain traction within the region. [High-level officials](#) assert that the country has built up the structural and institutional capacity that shields it from the worst effects of unilateral action. Our sources emphasized that trade diversification, proactive participation in global governance institutions, and a foreign policy anchored in national interest rather than ideological alignment have well-positioned Brazil in the evolving international order.

By contrast, Colombia remains structurally tethered to the United States. According to the Office of the U.S. Trade Representative, Colombia exported an estimated [USD 17.7 billion](#) and imported [USD 19.0 billion](#) in 2024. Similarly, U.S. FDI had reached [USD 4.9 billion](#) in 2022, of the [USD 17 billion](#) total FDI Colombia received that year. U.S.-led programs such as *Plan Colombia* have [embedded](#) bilateral security cooperation and assistance into the country's institutional fabric. While the Petro administration has cultivated a vision that champions the principles of strategic ambiguity, its ability to fully operationalize this vision remains constrained by the country's close economic, political, and cultural ties to the U.S.



Our sources noted that rhetorical shifts have not been matched by institutional reform or a coherent strategic doctrine needed to effectuate a foreign policy strategy similar to Brazil. Furthermore, several interviewees emphasized that while Brazil's strategy offers a helpful reference, **Colombia should tailor its approach to its own size, dependencies, and structural limitations. That preserves its traditional alliance with the U.S. in the short term, as President Petro cannot unplug Colombia from that relationship and rebuild a similar political, trade, and defense pact with another partner in the year he has left in office.**

CHINA'S EXPANDING FOOTPRINT IN LATIN AMERICA

One of the main drivers for Latin America and the Caribbean (LAC) recalibrating their strategic outlooks is China's unprecedented ascent as a global economic hegemon in the 21st century. [According to the Global Economy](#), between 1990 and 2023, China's share of global GDP has more than quadrupled from 3% to over 17%, underscoring the country's international expansion. Latin America is far from the exception in this trend, as a 2023 *Colombia Risk Analysis* report on [China](#) highlights.

Trade volume between Latin America and China has ballooned from [USD 12 billion](#) in 2000 to [USD 518 billion](#) by 2024. This trend is reinforced by the findings of the [European Parliamentary Research Service \(EPRS\)](#), which spotlights that China is now South America's largest trading partner, accounting for 26.7% of trade between Mercosur member countries. Brazil, Chile, Peru, Panama, Ecuador, and Uruguay are top exporters to China, with each country having a share of more than [20 % of total exports](#) in 2023. Despite this sharp uptick in trade, China's foreign direct investment (FDI) to the region still lags behind that of the United States and the European Union. Between 2003 and 2022, Chinese FDI in LAC totaled [USD 187.5 billion](#). Raw materials alone accounted for [46 %](#) of Chinese FDI between 2015 and 2021. Resource-driven demand continues to shape China's regional footprint, particularly in the lithium sector. China has a particular eye on Argentina, Bolivia, and Chile, collectively known as the "[Lithium Triangle](#)," holding more than half of the world's known lithium reserves.

Sources with in-depth knowledge about China-LAC relations underscored that part of the unprecedented economic global expansion is China's ability to leverage political and institutional mechanisms such as the China Development Bank (CDB) and the Export-Import Bank of China (EXIM) to expand its presence in Latin America. Since 2005, these two banks alone have extended over [USD 120 billion](#) in loans to Latin American countries, representing 24% of China's total global loan portfolio during that period.

Colombia and Brazil are no exceptions to China's expanding presence in Latin America, though their relationships with China differ tremendously in scale and trajectory.

Brazil's longstanding nonalignment and diversification strategy has enabled it to cultivate a robust and multifaceted partnership with Beijing, in contrast to Colombia's nonexistent, closed-off relationship until recently. Diplomatic relations between Brazil and the People's Republic of China date back to [1974](#), with the relationship elevated to a [strategic partnership](#) in [1993](#), making Brazil the first country in Latin America to achieve that status at the time. During President Lula's first presidency, bilateral ties strengthened significantly, with China surpassing the United States in [2009](#) as Brazil's largest trading partner. By 2023, trade between the two countries reached [USD 181.53 billion](#), generating a surplus of USD 63.31 billion for Brazil. Geopolitically, Brazil's nonalignment position aligns closely with Beijing's vision of global governance reform. Our sources emphasized that, as a result, China's continued expansion gives rise to Brazil's leverage in multilateral arenas. That said, Brazil's nonalignment strategy has still been [careful](#) not to fully lean into its China ties. For instance, rather than formally joining the Belt and Road Initiative (BRI), Lula has opted for a [cautious](#), project-by-project collaboration that aligns Chinese investment with Brazil's domestic priorities.



Colombia's trajectory with China contrasts sharply with Brazil's, shaped by structural economic dependence on the United States, which has resulted in a lack of a diversification strategy. Brazil's longstanding engagement with Beijing has provided it with both flexibility and strategic leverage, enabling a more calculated partnership that safeguards its autonomy. By contrast, Colombia's engagement remained shallow until October [2023](#), when President Petro and Chinese officials elevated the relationship to a strategic partnership during his state visit to Beijing. This milestone, though symbolically significant, has yet to translate into deep institutional or economic integration. Nevertheless, our sources noted that President Petro's ideological orientation and the intensification of U.S. unilateralism under a second Trump administration have accelerated Colombia's openness to Chinese engagement.

COLOMBIA'S INCREASED ENGAGEMENT IN MULTILATERAL INSTITUTIONS

As China consolidates its regional presence, the Petro Administration has taken an unprecedented and expedited push in positioning itself within this emerging multipolar infrastructure just in the first half of 2025. This shift reflects an effort to embrace strategic ambiguity and diversify external partnerships that the geopolitical dynamics have [precipitated](#). However, many experts consulted for this report emphasized that the Petro administration's approach is primarily reactive, lacking [strategic coherence](#).

Despite these constraints, these decisions are notable and indicative of the new trend seen as a result of the changing multipolar order. Colombia has formally joined several China-backed institutions, including the [Belt and Road Initiative \(BRI\)](#), the [New Development Bank \(NDB\)](#), and the [Asian Infrastructure Investment Bank \(AIIB\)](#). Meanwhile, it continues to evaluate the implications of full BRICS membership. Colombia's expanding participation in these platforms has the potential to create new avenues for bilateral convergence with Brazil, especially in areas related to development finance and infrastructure cooperation.

BELT AND ROAD INITIATIVE (BRI)

The [BRI](#) stands as China's most expansive vehicle for advancing its economic and geopolitical influence. Initially launched in 2013 to link Asia, Europe, and Africa through infrastructure corridors, the initiative extended to Latin America in 2018. **Colombia became the [22nd country in the region to sign a Memorandum of Understanding during President Petro's visit to Beijing at the CELAC-China forum in May 2025](#)**. While the MoU avoids binding legal commitments and excludes military cooperation, it serves as a symbolic gesture of intent. In the short term, Colombia's BRI membership is unlikely to yield significant outcomes unless supported by a structured pipeline of infrastructure priorities and sustained bureaucratic engagement.

NEW DEVELOPMENT BANK (NDB)

The BRICS created the [NDB](#) as their main financial arm to finance sustainable development projects in the Global South. Since 2015, it has approved more than [USD 40 billion](#) in funding across 122 initiatives worldwide. The bank's appeal lies in its perceived flexibility and lighter conditionalities compared to traditional Western financial institutions. Colombia submitted its formal [application](#) during President Petro's 2025 visit to China and pledged a [USD 512 million](#) contribution through the subscription of 5,125 shares. Unless Colombia strengthens its long-term project management capacity, it is likely that its engagement with the NDB risks remaining symbolic.



ASIAN INFRASTRUCTURE INVESTMENT BANK (AIIB)

The [AIIB](#) was established in 2016 to finance infrastructure across Asia and beyond, and now includes over 110 member countries, including [seven](#) from Latin America. In March 2025, Colombia announced its [intent](#) to seek AIIB membership in 2025; as of late September 2025, AIIB has not publicly confirmed Colombia's admission timeline. Project-based lending from the AIIB requires strong institutional capacity to manage transparency, ensure debt sustainability, and oversee technical project planning—areas in which Colombia has yet to demonstrate effectiveness. Colombia is likely to be admitted to the AIIB, but its ability to translate membership into effective infrastructure delivery remains uncertain.

BRICS AND EVALUATING COLOMBIA'S POTENTIAL ENTRY

Among China-linked multipolar platforms, BRICS stands as the most politically consequential. Initially conceived as a development-focused bloc for leading Global South economies, it has evolved into a broader political and economic alliance with [ten full members](#). According to the most recent estimates, BRICS accounts for roughly [45 %](#) of the world's population and [37.3 %](#) of global GDP. In addition to the New Development Bank (NDB), the bloc also operates the [Contingent Reserve Arrangement \(CRA\)](#), a financial safety net designed to provide emergency liquidity to members during periods of economic distress, a potential alternative to the IMF. The bloc's continued expansion has the potential to upend the multipolar system away from Western-centric institutions such as the Bretton Woods Institutions and NATO. The admission of states such as Iran has [reinforced the perception](#) that BRICS now functions as a geopolitical counterweight to the liberal international order and U.S. financial leadership.

The [17th BRICS summit](#), held in Rio de Janeiro in July 2025, unfolded amid an upsurge in global conflict and expanding U.S. protectionism. The summit was expected to reinforce unity and signal a coordinated response to shifting geopolitical fault lines. Instead, the [absence](#) of key leaders, including the General Secretary of the Chinese Communist Party, Xi Jinping, and Russian President Vladimir Putin, diluted the impact of the event. The [Rio Declaration](#) reiterated calls for reforming the United Nations Security Council and outlined initiatives on sustainable development, artificial intelligence, and cybersecurity. However, most proposals remained aspirational, and the summit yielded few measures with immediate application. Sources familiar with internal deliberations noted that language on unilateral sanctions and protectionist trade measures was deliberately [cautious](#), signaling frustration without provoking direct confrontation with Washington, likely due to their [strong trade dependency](#) on the United States. Proposals to develop alternative financial infrastructure, including [BRICSPAY](#), aimed at reducing dependence on dollar-denominated payment systems, also lacked concrete timelines or implementation frameworks. Analysts assessed the final messaging as underwhelming and emblematic of the bloc's ongoing struggle to translate rhetoric into institutional depth.

Colombia's deeper engagement with multipolar institutions has elevated the prospect of full BRICS membership to the forefront of policy debates. A formal application would signal a historic turning point in Colombia's foreign policy, reflecting a shift toward broader multipolar engagement and a deliberate recalibration away from the U.S.-designed architecture that has shaped its strategic orientation for decades.



Brazil's long-standing membership of these institutions provides Colombia with a precedent for strategic ambiguity and new bilateral opportunities that have the potential to strengthen economic and political cooperation. Yet, recent history underscores the vulnerability of such decisions to leadership changes and ideological divides. Argentina's [invitation](#) to join BRICS in August 2023, with entry scheduled for [January 1, 2024](#), was [rescinded](#) following President Javier Milei's election. This reversal undermined Brazil's efforts after Lula's administration had [championed](#) its inclusion. This episode has heightened caution among BRICS members, including Brazil, toward extending membership to states with domestic political uncertainty and high polarization.

Officials interviewed for this report emphasized that the geopolitical risk of pursuing full membership remains high, particularly considering the fragility of U.S.-Colombia relations. Analysts noted the high likelihood of U.S. economic retaliation, which would impact trade, aid, and military cooperation. Such a shift would likely spark domestic backlash, further polarizing Colombia's already fragmented political landscape ahead of the 2026 elections. The Petro administration will likely continue its rhetorical flirtation with BRICS, alongside engagement with a multipolar architecture, with formal membership likely to remain off the table in the near term. **However, even if Colombia were to advance toward membership, the process would stay at such an early stage that a successor government is likely to withdraw with limited costs and gain favor with the Trump administration.**

BRICS ACCESSION

COLOMBIA'S TRADEOFFS AND BILATERAL OPPORTUNITIES WITH BRAZIL

ADVANTAGES OF BRICS ACCESSION	BILATERAL OPPORTUNITIES WITH BRAZIL	POLITICAL RISKS AND DRAWBACKS
Diversified trade and investment channels	Alignment on strategic ambiguity	Strained U.S.-Colombia relationship
Access to non-Western financial mechanisms and markets	Joint coordination on BRICS-linked trade and infrastructure projects	Risks of reduced aid, diplomatic tension, and trade losses
Greater strategic autonomy	Forums to promote private sector synergies	Domestic political polarization
Increased bargaining power on global governance reform	Policy learning from Brazil's BRICS experience	Internal divisions within BRICS and weak enforcement
Symbolic leadership among U.S.-aligned countries seeking multipolarity	Diplomatic bridge through Brazil to ease integration into the bloc	Questionable long-term economic gains
Access to development financing with fewer conditions (e.g., NDB, AIIB)	Greater regional integration opportunities	Association with authoritarian regimes may tarnish Colombia's image

PRESIDENT TRUMP AND THE REVIVAL OF U.S. ECONOMIC COERCION

The second Trump administration has significantly complicated the efforts of countries implementing strategic ambiguity. President Trump has led an aggressive revival of early 20th-century protectionism, coupled with an immediate [dismantling](#) of traditional U.S. soft power diplomacy. Despite Washington's withdrawal, the geopolitical cost of engaging multipolar alternatives has never been higher. As the United States increasingly views China's expanding global infrastructure as a direct threat to its hegemony, the administration has leaned heavily on coercive economic tools, as exemplified by the unveiling of "[Liberation Day](#)" Tariffs in April. Our sources emphasized that Trump's [weaponization](#) of unilateral measures has raised the geopolitical cost of strategic ambiguity and forces countries like Colombia and Brazil to tread even more carefully as they recalibrate their partnerships.

U.S. UNILATERALISM AND DIPLOMATIC FLASHPOINTS WITH COLOMBIA AND BRAZIL

● COLOMBIA ● BRAZIL



LIBERATION DAY DECLARED

The Trump administration announces "Liberation Day," imposing a 10% tariff on all Colombian and Brazilian exports to the U.S., effective April 9.

DIPLOMATIC RECALL & BRICS SUMMIT EXIT

Washington recalls its top diplomat for consultations after accusations. To de-escalate tensions, President Petro cancels his planned participation in the BRICS annual summit.

Jan 26,
2025

TRUMP-PETRO TWITTER CLASH AFTER DEPORTATION INCIDENT

A diplomatic dispute erupts after two U.S. military flights carrying 201 Colombian deportees attempt to land in Bogotá. A social media clash follows, with inflammatory tweets exchanged and Trump issuing tariff threats.

April 2,
2025

June 29,
2025

PRESIDENT PETRO ACCUSES U.S. OF COUP INVOLVEMENT

President Petro publicly alleges U.S. coordination in a coup attempt, implicating his former Colombian Foreign Minister Álvaro Leyva and U.S. Secretary of State Marco Rubio.

July 3,
2025





ACCUSATIONS OF POLITICAL PERSECUTION SPARK NEW TARIFFS

Trump announces a 50 percent tariff on Brazilian goods, citing political persecution of former President Jair Bolsonaro as justification.

July 7, 2025

PRESIDENT TRUMP THREATENS ADDITIONAL TARIFFS ON BRICS-ALIGNED COUNTRIES

The U.S. threatens to impose an additional 10 percent tariff on BRICS members and aligned countries, sending letters to 14 governments, including Japan and South Korea their policies.

July 9, 2025

Aug 6, 2025

BRAZIL TARIFFS TAKE EFFECT

Tariffs on Brazil are enforced. Brasilia appeals to the WTO and pledges to defend its interests.

Sep 15, 2025

PRESIDENT TRUMP DECERTIFIES COLOMBIA

The U.S. decertifies Colombia for failing to curb drug trafficking, the first time since 1996. However, a waiver allows aid and security cooperation to continue.

Sep 22, 2025

SANCTIONS IMPOSED ON BRAZILIAN JUSTICE MORAES & WIFE



The U.S. Treasury imposes Magnitsky sanctions on Justice Alexandre de Moraes in July, citing political motives linked to Bolsonaro's prosecution. These penalties are later extended to his wife Viviane Barci de Moraes, without clarifying the specific motives of the charge.

Sep 23, 2025

PRESIDENT PETRO'S SCATHING UNGA SPEECH

At the UN General Assembly, President Petro denounces President Trump's foreign policy, accuses him of complicity in genocide, and calls for criminal prosecution over U.S. attacks on alleged drug boats. The U.S. delegation walks out.

Sep 26, 2025

U.S. REVOKES PRESIDENT PETRO'S VISA

During a pro-Palestinian rally outside the UN, President Petro urges U.S. soldiers to disobey Trump's orders and "not point their guns at people." The State Department revokes President Petro's visa, prompting several Colombian ministers to renounce theirs in protest.

Oct 19, 2025

THE US CUT AID TO COLOMBIA AND CALLED PRESIDENT PETRO A "DRUG TRAFFICKER."

President Petro accused the U.S. of murdering a fisherman in an attack on a boat. President Trump responded that he would slash assistance and impose new tariffs on the country.



NAVIGATING THE MULTIPOLAR LANDSCAPE

U.S.-China great power rivalry, coupled with the Trump administration's confrontational unilateralism, is placing a growing strain on Colombia's diversification efforts and on Brazil's tradition of strategic non-alignment. As Washington leverages economic power to extract political concessions, governments face sharper pressure to take sides. China's expanding investments and infrastructure footprint across Latin America intensify this dilemma, creating a geopolitical minefield for Colombian policymakers seeking to avoid antagonizing either power. Within this context, our sources stressed that the multipolar landscape presents an opportune moment for deeper Colombia-Brazil integration.

While Brazil has long positioned itself as a benchmark of strategic non-alignment, current global dynamics have further incentivized the nation to broaden and double down on its diversification strategy. This endeavor is most evident in its renewed [push](#) for the long-stalled EU-Mercosur trade pact, which, after two decades, is making substantive progress towards ratification. On [September 3](#), the European Commission transmitted the final agreement text to the EU Council and Parliament, [establishing](#) an Interim Trade Agreement subject to potential veto by any single member state. At the same time, Brazil continues to diversify beyond Europe, pursuing negotiations for a [Mercosur-Indonesia](#) free trade agreement and [targeting](#) Asian and Middle Eastern markets for beef exports. These markets are viewed as more dynamic and less encumbered by regulatory barriers than Europe, underscoring Brazil's strategy of hedging across multiple geographies.

In contrast, Colombia faces a far more constrained environment. The upcoming [CELAC-EU](#) summit this November in Santa Marta presents an opportunity for both Colombia and Brazil to advance ties with Europe and explore new trade and investment frameworks. Yet, the Trump administration's punitive approach toward countries based on their foreign policy alignments and domestic political choices presents a sharper stress test for Colombia than for Brazil. Structural dependence on U.S. trade, aid, and security cooperation leaves Bogotá with limited room to maneuver, as diversification efforts without institutional depth risk triggering disproportionate costs. Experts interviewed stressed that Colombia lacks the institutional insulation or economic buffer needed to absorb such shocks. In this context, any pivot toward multipolar institutions demands strategic foresight, technical rigor, and long-term planning. As one leading academic emphasized, Colombia's current execution of strategic ambiguity under President Petro lacks the technical underpinnings required for resilience.

CASE STUDY

PANAMA'S WITHDRAWAL OF BRI: A CAUTIONARY TALE OF THE RISKS OF STRATEGIC AMBIGUITY

Panama's experience underscores the geopolitical risks of symbolic multipolar engagement undertaken without strategic preparation or institutional resilience. In [2017](#), Panama became the first Latin American country to formally join the Belt and Road Initiative, a move that signaled a willingness to deepen ties with China. Panama's geostrategic significance is critical to the U.S.'s commercial and geopolitical interests.

Shortly before taking office, President Trump [accused](#) Panama of overcharging U.S. shipping companies for canal usage and claimed that Chinese military personnel were present at the canal. He threatened direct intervention to reassert complete U.S. control if these conditions persisted. These public allegations reflect the intensifying U.S.-China rivalry and Washington's willingness to contest perceived Chinese influence in areas it considers strategically vital.



While Panamanian President José Raúl Mulino initially affirmed national sovereignty and resisted Washington's demands, the pressure intensified. By February, Panama announced its [withdrawal](#) from the BRI. This reversal illustrated how quickly strategic ambiguity can unravel when a country lacks the institutional capacity, economic diversification, and diplomatic leverage to resist sustained U.S. pressure.

The Panama case holds direct lessons for Colombia. Participation in multipolar institutions such as the BRI or the New Development Bank without robust institutional frameworks, cultural investments, and technical expertise leaves Colombia highly exposed to punitive measures. The Petro administration's diversification strategy remains structurally fragile, lacking the policy depth required for resilience. Brazil, although increasingly under U.S. scrutiny, has employed a more calculated diversification mode that has preserved greater room for negotiation and reduced its exposure to coercive pressure

Without a substantial strengthening of institutional capacity, Colombia risks replicating the vulnerabilities seen in Panama's reversal. Strategic ambiguity, without coherent long-term planning and clear execution, is unlikely to yield sustainable benefits. In the current geopolitical climate, a sophisticated and coordinated diversification strategy presents the most viable path to reduce exposure and expand areas of bilateral integration with Brazil. By aligning diversification efforts, both countries are likely to create new opportunities for collaboration that lessen geopolitical vulnerabilities and position the bilateral relationship for greater strategic depth.



FUTURE OF COLOMBIA-BRAZIL RELATIONS

CURRENT ELECTORAL LANDSCAPE

The trajectory of Colombia–Brazil relations over the next year will hinge on the outcomes of both countries' presidential elections, as our most [recent report](#) on Colombia's elections suggests. The shifting geopolitical environment, as well as the capacity of the next administrations to translate foreign policy agendas into concrete action, are also critical. Leadership dynamics and ideological alignment will likely determine whether the relationship remains confined to cordial distance or advances into a strategic, resilient partnership capable of realizing its long-recognized potential.

Colombia Risk Analysis published a comprehensive report in August 2025 examining Colombia's domestic electoral landscape, including political fragmentation and the viability of leading candidates. Readers are encouraged to consult this [report](#) and follow our social media channels for ongoing updates.

In Brazil, the political environment remains [highly uncertain](#). One senior expert interviewed for this report noted parallels to the United States in 2024, a haggard Joe Biden sought reelection without a clear Democratic successor, while the Republican right was divided over the path forward amid Trump's controversial influence and ongoing legal battles. On Brazil's left, concerns are mounting over President Lula's [age](#). Despite these doubts, the Workers' Party (PT) has pledged full [support](#) for his reelection bid without naming an alternative candidate, raising questions about leadership succession. On the right, divisions persist between hardline Bolsonaro loyalists and more moderate conservatives seeking distance from his rhetoric and legal controversies. The Superior Electoral Court (TSE) had already [barred](#) former President Jair Bolsonaro from running for public office until 2030 for undermining confidence in the voting system. These developments were followed on [September 11](#) by the Supreme Federal Tribunal's (STF) decision to convict him on multiple-coup-related charges, sentencing him to [27](#) years in prison. This decision marked the first conviction of a former president for crimes against democracy. However, the ruling is subject to appeal, and Bolsonaro continues to wield significant influence within conservative circles.

External pressures have further complicated Brazil's domestic picture. Unprecedented U.S. intervention, particularly efforts by the Trump administration to pressure Brazil's judiciary in favor of Bolsonaro, has triggered a [“rally around the flag”](#) effect. Reinforced by all major September polls, this dynamic suggests that President Lula will comfortably defeat Bolsonaro in a hypothetical 2026 runoff. The [Atlas-Intel Bloomberg](#) poll finds Lula at 51.8% to Bolsonaro's 44.8%, reflecting a widening margin. With Bolsonaro legally sidelined, recent polling indicates Governor Tarcísio de Freitas of São Paulo as the most [competitive](#) conservative alternative. He is viewed as a mediator capable of bridging moderate conservatives and pro-Bolsonaro factions. Experts interviewed for this report stress that the right's viability in 2026 will likely depend on rallying around a non-Bolsonaro figure while capitalizing on PT's perceived shortcomings in security, economic stability, and drug policy.

In both countries, domestic politics are increasingly shaped by external geopolitical forces. Candidates across the spectrum face mounting pressure to align domestic priorities with coherent foreign policy strategies that demand a careful recalibration. The following section outlines four scenarios, shaped by combinations of electoral outcomes,



ideological compatibility, and diversification strategies, that range from continued cordial neglect to the emergence of a strategically aligned partnership.

The outlook for Colombia–Brazil relations hinges not only on leadership alignment but also on how each government interprets the risks and opportunities of multipolar engagement. While a pragmatic, non-ideological alignment remains the most likely scenario, ideological convergence or decoupling has the potential to accelerate or derail the relationship’s trajectory substantially. Policymakers and investors are monitoring domestic electoral shifts and external economic signals as early indicators of which scenario is beginning to materialize heading into 2026.

SCENARIO 1: STEADY PRAGMATIC COOPERATION (MOST LIKELY)

Colombia elects a moderate or center-right leader; Brazil retains a center-left coalition or a center-right candidate.

- Emphasis on pragmatic, non-ideological foreign policy.
- Strategic ambiguity proceeds with greater institutional depth.
- Brazil acts as a stabilizing partner.
- Incremental deepening in sectors like energy and trade.

Progress in the bilateral relationship is shaped not by ideological affinity, but by deliberate efforts to maximize shared economic interests while avoiding unnecessary friction with significant powers.

Moderate, less ideological leaders in both countries will likely drive incremental, institutionalized diversification. Integration will likely expand, especially in areas of the lowest retaliatory pressure from the U.S. Strategic diversification will likely be much more methodical and pragmatic.

SCENARIO 2: CENTER-RIGHT / CONSERVATIVE CONVERGENCE (SOMEWHAT LIKELY)

Both Colombia and Brazil elect conservative or right-leaning governments aligned more explicitly with U.S. strategic preferences. Under this scenario, it is highly likely that the bilateral relationship shifts sharply toward securitized cooperation, anti-China signaling, and policy frameworks designed to reinforce traditional hemispheric hierarchies.

- Both countries elect right-leaning governments aligned with U.S. priorities.
- Bilateral ties focus on security and anti-China signaling.
- Multilateral initiatives like BRICS face setbacks.
- Relationship narrows, reinforcing traditional hemispheric hierarchy.

Washington’s influence is likely to expand in both countries, reinvigorating trade, military, and intelligence cooperation while sidelining multilateral alternatives. According to expert interviews, BRICS-linked investment initiatives face new regulatory and political barriers, while regional forums lose traction in favor of bilateral coordination with the U.S.

This scenario reflects a rollback of diversification rhetoric, with Colombia and Brazil repositioning themselves firmly within a U.S.-led economic and security bloc. While bilateral ties persist, their substance will narrow and be increasingly dictated by third-party interests.



SCENARIO 3: CENTER-LEFT / PROGRESSIVE CONVERGENCE (LOW LIKELIHOOD)

This scenario anticipates a progressive resurgence in both countries, with Colombia electing a left-leaning leader aligned with the current administration, and Brazil maintaining PT continuity through Lula's reelection or a PT-aligned successor. Under these conditions, the bilateral relationship likely enters a period of accelerated integration, framed around shared South-South diplomacy and regional multilateralism.

- Both countries elect leftist leaders aligned with President Petro and President Lula's political movements.
- Accelerated integration around Global South diplomacy, BRICS, and climate governance.
- High risk of U.S. retaliatory measures.
- Sustainability depends on internal resilience to external shocks.

Sources interviewed underscored that under this scenario, multilateral engagement intensifies, particularly through the New Development Bank and associated financial platforms. Joint leadership on Amazon preservation, climate governance, and South-South cooperation becomes a pillar of bilateral collaboration.

The U.S. is likely to respond to this alignment with retaliatory trade measures, downgrades to security cooperation, and diplomatic pressure aimed at isolating Colombia within key alliances. The sustainability of this approach hinges on each government's ability to absorb external shocks and resist domestic backlash.

SCENARIO 4: IDEOLOGICAL DIVIDE AND BILATERAL DRIFT (VERY LOW LIKELIHOOD)

This scenario envisions a hard divergence, with Colombia and Brazil electing governments on opposite ends of the ideological spectrum. Under such conditions, it is likely that bilateral engagement takes a major step back and even loses its historic cordiality.

- Divergent ideological leadership (e.g., right-wing Colombia, left-wing Brazil).
- Bilateral engagement fractures; cooperation stalls.
- Polarization in regional forums.
- Colombia risks isolation; Brazil deepens ties with BRICS.

Cooperation on trade, migration, and regional diplomacy stalls, and existing mechanisms of coordination lose political momentum. In this scenario, it's highly likely that Brazil deepens its commitment to BRICS+ and expands cooperation with other progressive Latin American governments, while Colombia makes a full pivot toward Washington, enacting a security strategy hyper-dependent on the US.

Diplomatic tensions likely intensify in regional forums, and shared initiatives, particularly on climate or Amazon governance, would be deprioritized or politicized. In this scenario, Colombia risks strategic isolation within new multipolar infrastructure and Latin America multilateral forums, undermining the broader goal of diversification and regional leadership.



CONCLUSION

In the 21st century, Colombia and Brazil have maintained a partnership marked by a friendly distance and persistent untapped potential. Despite decades of stable, friendly rhetoric, both countries have failed to convert goodwill into long-lasting institutional frameworks capable of sustaining integration through domestic and geopolitical shifts. The current multipolar transition presents a rare opportunity to alter this trajectory. It is highly unlikely for the partnership to take off in the current environment of polarization and geopolitical uncertainty, particularly as both countries approach hotly contested electoral cycles.

The bilateral relationship will also carry over structural impediments such as Venezuela's unresolved political and economic crisis, the limited effectiveness of regional forums, multilateral treaty organizations and the lack of regulatory alignment. Ideological divergences, weak institutions, and a lack of leadership convergence threaten to hinder the evolution of multilateral organizations into credible vehicles for integration.

Externally, China's expanding multipolar infrastructure and the United States' renewed economic coercion are likely to shape the volatile geopolitical risk environment. Brazil's tradition of nonalignment affords it greater room for negotiation and flexibility, while Colombia's structural dependencies on the United States leave it more vulnerable to retaliatory pressure. Diversification is likely to play a role in risk mitigation, but its effectiveness will hinge on implementation and execution. A diversification strategy by the Colombian government that is grounded in a long-term, calibrated game plan has the potential to strengthen institutional, technical, and regulatory authorities and is likely to enhance Colombia's bilateral relationship with Brazil. However, the Petro administration's closing time frame will likely cut short any tangible effort towards these objectives.

As both countries approach the 2026 electoral cycle, the prospect of a prioritized and transformative alliance depends on a bilateral commitment to institutionalizing cooperation across environmental, security, defense, trade, and multilateral arenas. Steady pragmatic cooperation is the most likely scenario, without ruling out the potential for disruptive leadership either in Colombia or Brazil to upend bilateral cooperation and set back the relationship.



