Industrial Policy and International Cooperation

Brazil's Opportunities and Challenges in the Face of New International Trends

GSRC
全球南方研究中心
Global South Research Center

Authors

Marta Fernandez	Director, BRICS Policy Center
Ana Saggioro Garcia	Associate Research Fellow, BRICS Policy Center
Maria Elena Rodriguez	Deputy Director, BRICS Policy Center
Lucas Carames	Research Fellow, BRICS Policy Center

Please cite the report as foIIows: Fernandez, Marta, Ana Saggioro Garcia, Maria Elena Rodriguez, and Lucas Carames. 2025. “Industrial Policy and International Cooperation: Brazil’s Opportunities and Challenges in the Face of New International Trends.” Beijing: Global South Research Center.

Summary

After the 1930s, Brazil adopted an import-substitution strategy to advance its industrialization and achieved a period of economic prosperity. However, by the 1980s, in response to pressing macroeconomic challenges, the country's policy orientation shifted from developmentalism to neoliberalism. Market liberalization and economic financialization ultimately resulted in several decades of deindustrialization.

In the current context marked by profound changes in the global landscape, accelerating energy transition, and the rise of the Global South, Brazil has launched the New Industry Brazil (NIB) initiative as the core of its reindustrialization agenda. Distinct from the classical import-substitution model, the NIB seeks to strengthen domestic value chains without isolating Brazil from international markets. The goal is to reposition the country as an exporter of higher-value-added industrial goods by leveraging its dynamic comparative advantages in the bioeconomy, green energy, digital transition, and a consolidated scientific base. The initiative's effectiveness will depend on institutional coordination, federal alignment, and integration with policies on science, technology, education, and public procurement. Automotive, renewable energy, and aerospace sectors play strategic roles in Brazil's industrial revival.

Looking ahead, Brazil's reindustrialization can advance along the following pathways: 1) Reorienting macroeconomic policy to support reindustrialization; 2) Rebuilding the state capacity for planning and coordination; 3) Overcoming the contradiction between monetary policy and industrial strategy; 4) Conditioning public incentives on social, environmental, and technological commitments; 5) Leveraging public financial architecture for a sovereign and just transition; 6) Investing in workforce training and digital inclusion; 7) Regionalizing industrial policy and promoting productive integration in South America; and 8) Expanding productive and technological cooperation with China and other Global South countries.

CONTENTS

Acronyms and Abbreviations

BNDES	National Bank for Economic and Social Development
FINEP	Financier of Studies and Projects
GDP	Gross Domestic Product
IBGE	Brazilian Institute of Geography and Statistics
MDIC	Ministry of Development, Industry, Trade and Services
MOVER	Green Mobility and Innovation Program
NIB	New Industry Brazil
PAEG	Government's Economic Action Plan
PED	Strategic Development Program
R&D	Research and Development

GSRC 全球南方研究中心
Global South Research Center

Industrial Policy and International Cooperation: Brazil's Opportunities and Challenges in the Face of New International Trends

Brazil's industrialization has been closely intertwined with the changes of the international landscape and national industrial policy. From the perspective of industrial policy, this report analyzes the country's trajectory from industrialization to deindustrialization and examines the potential and constraints of its reindustrialization by discussing the NIB initiative and conducting case studies on strategic sectors. The report is structured into four main parts: Part 1 reviews the history of Brazilian industrialization; Part 2 discusses the country's opportunities and challenges for industrialization in the face of the new international trends; Part 3 provides case studies in the automotive, renewable energy, and aerospace sectors; and Part 4 offers policy recommendations for advancing reindustrialization.

1.
HISTORY OF BRAZILIAN INDUSTRIALIZATION

1.1
Import-Substitution Industrialization and the "Developmentalist Era" (1930s–1980s)

In the 1930s, with the decline of the coffee economy, Brazil moved to build a broader and more sustainable industrial base and its industrialization accelerated (Furtado [1953] 2007; Tavares [1972] 2011; Bielschowsky & Mussi 2013). The Getúlio Vargas administration (1930–1945) adopted an import-substitution strategy, redirecting resources toward domestic industry through foreign-exchange controls, public investment, and national industrial institutions. These measures preserved domestic incomes amid the global turmoil. The creation of the Brazilian Institute of Geography and Statistics (IBGE), the Department of Public Service Administration, and other agencies expanded the government's ability to diagnose, plan, and execute economic policy. The establishment of Companhia Siderúrgica Nacional (1941) and Vale do Rio Doce (1942) paved the way for subsequent industrial development.

Following World War II, Brazil experienced alternating episodes of trade liberalization and renewed import controls. From Vargas's second administration (1951–1954) onward, industrial-

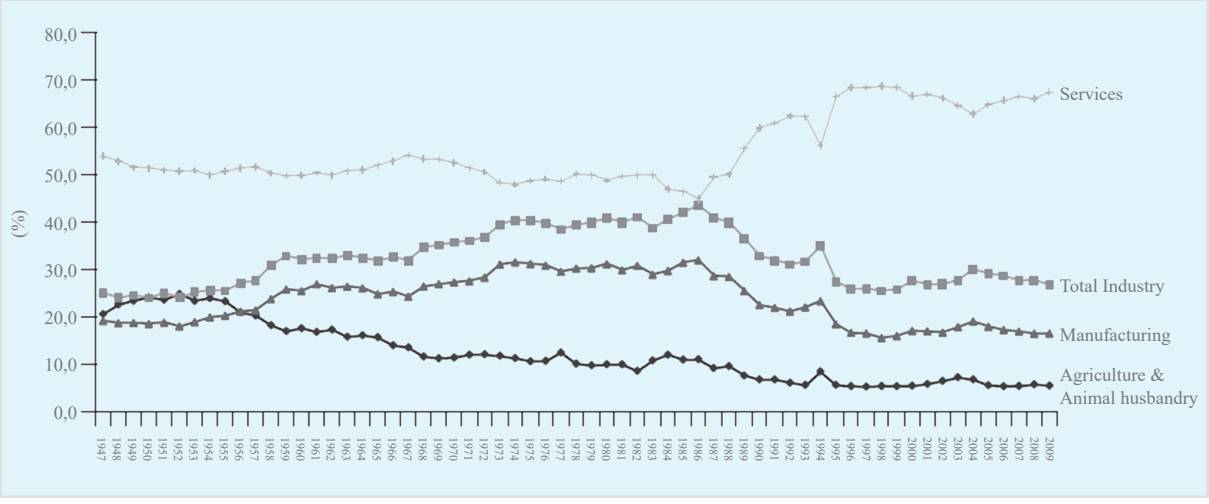

FIGURE 1

GDP Share of Different Sectors' Value Added in Brazil, 1947–2009

Source: IBGE; Squeff 2012.

TABLE 1

Brazilian Macroeconomic Indicators, 1956–1984

	1956–1960	1961–1963	1964–1967	1968–1973	1974–1978	1979–1980	1981-1983	1984
GDP growth (%)	8.1	5.2	4.2	11.1	6.7	8.0	-2.2	5.4
Inflation rate (%)	24.7	59.1	45.5	19.1	37.8	93.0	129.7	223.9
Gross fixed capital formation (% of GDP)	16.0	15.2	15.5	19.5	22.3	23.5	22.4	18.9
Growth rate of goods exports (%)	-2.3	3.5	4.1	24.6	15.3	26.1	2.8	23.3
Growth rate of goods imports (%)	3.2	0.0	2.7	27.5	17.2	29.5	-12.4	-9.8
Trade balance (US$ million)	125	44	412	0	-2,283	-2,831	2,818	13,009
Current account balance (US$ million)	-290	-296	15	-1,198	-6,548	-11,724	-11,584	95
Net external debt/ Exports of goods	1.9	2.4	2.0	1.8	2.5	2.9	3.7	3.3

Source: Villela 2005; Hermann 2005a.

ization became an explicit policy objective. The government increased investment in infrastructure, expanded energy supply, promoted steel production, and created long-term financial institutions, laying foundations for the subsequent industrial expansion (Figure 1). The Kubitschek administration (1956–1961) consolidated the developmentalist agenda through development plans and coordinated public and private investment, particularly in the automotive, heavy machinery, and energy sectors. Foreign capital became involved in Brazilian industrialization, forming the "tripod of state capital-national capital-foreign capital" (Bielschowsky & Mussi 2013). However, by the early 1960s, slowing economic growth (Table 1) and heightened political tensions stalled developmentalist policies.

Under the military regime (1964–1985), economic policy aimed at gradually reducing inflation, expanding exports, and restoring growth. Between 1964 and 1967, the Government's Economic Action Plan (PAEG) and tax and financial reforms sought to increase revenue and rationalize taxation, and to provide the Brazilian financial system with sufficient financing conditions (Hermann 2005b). With the shift from PAEG policies to the Strategic Development Program (PED), the economy achieved rapid growth, with gross domestic product (GDP) expanding by an average of 11% annually in the period 1968–1973. The cycle combined lower inflation rates and eased balance of payments pressures. The period 1974–1984 witnessed both the peak and the exhaustion of the import-substitution model. Hydropower, petrochemicals, and steel expanded, accompanied by improvements in technological and productive capabilities. However, the oil shocks, rising external debt, and dependence on foreign capital placed a substantial strain on Brazil's macroeconomic environment.

1.2
From Neoliberalism to New Developmentalism (1980s–Present)

In the 1980s, intensifying inflation, growing fiscal pressures, tightening international credit conditions, and widening trade deficits shifted the policy focus away from developmentalism toward managing pressing macroeconomic challenges. State-owned enterprises were instrumentalized for macroeconomic control (tariff/price administration, cash transfers to the Treasury), losing their role in capital expenditure and focusing on long-term industrial aims (Castro 1994). Import liberalization and privatization in the 1990s hastened Brazil's premature deindustrialization and undermined its domestic technological capabilities. Market liberalization eroded strategic productive capacities and narrowed the scope of industrial policy instruments. The deepening financialization of the economy reoriented accumulation from relying on physical investment to counting on speculative gains. Between 1986 and 1998, the country's manufacturing share of GDP fell sharply from 32.1% to 19.7%. Despite the overall contraction in GDP share, industry maintained a diversified structure.

The first decade of the 21st century brought stability. Buoyant domestic demand sustained an acceleration of manufacturing value added, with industrial employment also improving (Figure 2). In this context, higher-technology-intensity sectors increased their shares of manufacturing value added and employment (Vergnhanini & Onoda 2024). In the subsequent decade, the deterioration of macroeconomic conditions generated recessionary trends. By 2019, manufacturing share of GDP had fallen further to 10.3%. Between 2014 and 2022, Brazil recorded an average annual GDP growth of just 0.3%, with the manufacturing sector performing even worse, shrinking by an average of 1.8% annually (Feijó, Feil & Teixeira 2024). Even so, Brazil retains productive foundations in aerospace, oil and gas, agrotechnology, and energy. If effectively aligned with innovation and strategic national priorities, these sectors would still possess the capability to underpin a renewed industrialization.

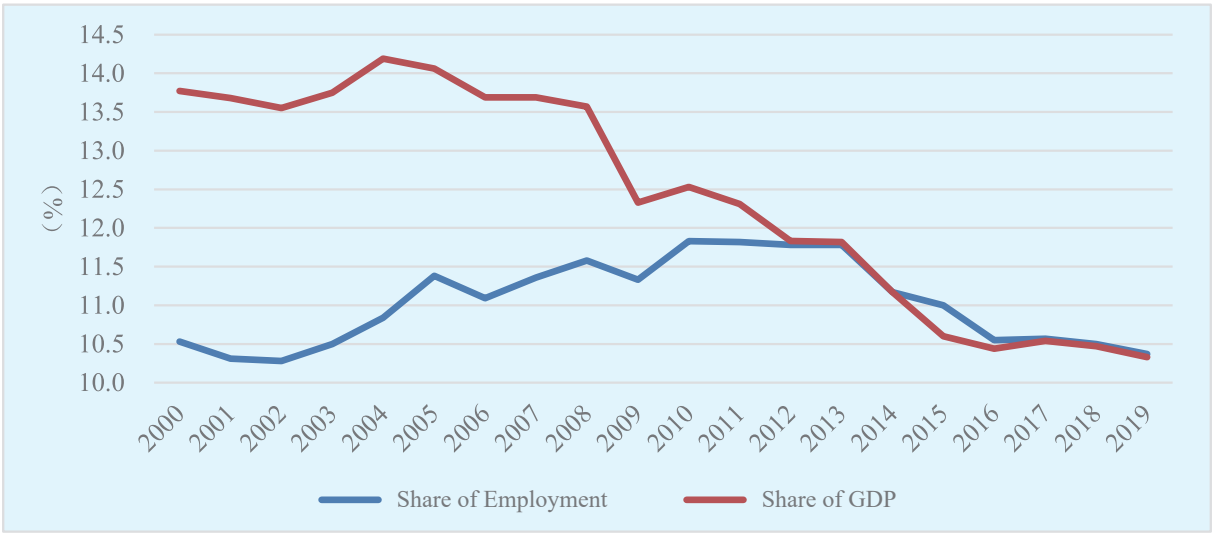

FIGURE 2

Manufacturing Share of Employment and GDP in Brazil, 2000–2019

Source: IBGE; Vergnhanini & Onoda 2024.

2.
OPPORTUNITIES AND CHALLENGES FOR BRAZIL'S REINDUSTRIALIZATION

Amid the profound changes of the global landscape, accelerating energy transition, and the rise of the Global South, Brazil formally launched the NIB initiative in 2024 as the central pillar of its reindustrialization strategy. Coordinated by the Ministry of Development, Industry, Trade, and Services (MDIC), and developed with technical support from the National Bank for Economic and Social Development (BNDES), the Brazilian Agency for Industrial Development, and the Financier of Studies and Projects (FINEP), the initiative reflects a renewed effort to construct a long-term industrial policy grounded in institutional collaboration and public consultation. Approximately BRL300 billion (about US$55 billion) is provided by BNDES, FINEP, and the Brazilian Company for Industrial Research and Innovation (EMBRAPII) to support the initiative.

Unlike the import-substitution model, the NIB initiative is designed to remain deeply integrated into the global trading system while simultaneously advancing technological autonomy and productive sovereignty. Rather than reverting to classical protectionism, the plan relies on instruments that are compatible with an open economy: strategic public procurement, technological orders, local-content requirements, targeted financing, innovation subsidies, and environmental and technological standards in public tenders. The goal is to reposition the country as an exporter of higher-value-added industrial goods by leveraging its dynamic comparative advantages in bioeconomy, green energy, digital transition, and a consolidated scientific base. It also emphasizes enhanced South-South cooperation, prioritizing ties with Africa, Asia, and Latin America to diversify markets and foster productive cooperation. Thus, the initiative is consistent with the reconfiguration of global geopolitics and the critique of dependency on North Atlantic value chains.

The NIB initiative combines conventional policy instruments with medium- and long-term planning to introduce a mission-oriented industrial policy. Its overarching objective is to rebuild a modern, sustainable, digital, and inclusive industrial ecosystem, driven by innovation and aligned with the green transition, and to achieve this vision through higher local content levels and more coordinated industrial chain development. The initiative focuses on priority sectors, including agribusiness, health industries, urban infrastructure, digital transformation, energy transition, and defense technologies, with the goal of revitalizing industry by 2033. Its core ambition goes beyond enhancing the competitiveness of selected sectors to integrating innovation, sustainability, and social inclusion as the three pillars of a new development model. The initiative should not be understood merely as a new industrial policy, but as part of a broader agenda of productive transformation that redefines the very structure of the Brazilian economy. The state reassumes an active developmental role, moving beyond market regulation toward strategic coordination (Nassif

2024).

Although the plan marks an advance over past fragmented industrial policies, its success depends more on institutional alignment, federative coordination, and integration with science, technology, education, and public procurement policies—essential ingredients for an effective industrial policy. Without lower interest rates, stable and competitive exchange rates, and a flexible fiscal framework conducive to productive investment, such a mission-oriented initiative risks remaining largely symbolic. Reindustrialization requires state intervention not only via funding but also in interministerial and intergovernmental coordination. Industrial policy must be grounded in social, environmental, and domestic content commitments, linked to a long-term vision that addresses regional inequality and promotes productive autonomy, and not captured by large economic groups. To ensure that the initiative effectively supports a green, digital, and inclusive industrial transformation, Brazil must adhere to a new sustainable development compact that places labor rights, social welfare, and environmental sustainability at the center of economic decision-making.

3. STRATEGIC SECTORS FOR BRAZIL'S INDUSTRIAL RENEWAL

3.1 Automotive Industry

The automotive industry serves as the most important component of Brazil's manufacturing sector, accounting for nearly one-fifth of the country's industrial GDP (ANFAVEA 2025) and connecting multiple industrial chains, including steel, petrochemicals, and logistics. It generates employment, exports, and technological innovation, remaining as one of the country's most sophisticated manufacturing sectors.

The automotive sector has long been a symbol of Brazilian industrialization. It flourished during the Kubitschek administration. In the 1990s, trade liberalization exposed it to global competition, revealing the limitations of the country's industrial strategy in promoting technological upgrading and localization. In the early 21st century, the Brazilian government attempted to rebuild innovation capacity through programs such as the "Inovar-Auto" incentive program and "Rota 2030", but these efforts were constrained by fiscal limitations, weak inter-agency coordination, and international trade disputes surrounding industrial policy incentives. The "Road to School" (Caminho da Escola) program, rolled out in 2007, provides adapted school buses for rural and riverside areas through public procurement, tax incentives, and BNDES financing, becoming a successful model that integrates mobility, social inclusion, and industrial development. The Green Mobility and Innovation Program (MOVER), approved in 2024, is the largest decarbonization initiative in Brazil's industrial history. The program allocates over BRL19 billion in tax credits (2024–2028) to research and development (R&D) in sustainable mobility, leveraging another BRL60 billion in private investment (ANFAVEA 2025). MOVER's pillars include promotion of renewable fuels (especially ethanol) for hybrid vehicles, and incentives for fleet electrification. The "Green IPI" tax was launched to lower rates for low-emission vehicles and raise rates for higher-emission ones. Further innovation is the shift from "tank-to-wheel" to "well-to-wheel" carbon accounting, which encompasses emissions from fuel extraction to vehicle disposal.

The automotive sector exemplifies Brazil's industrial potential and challenges: advanced production capacity, strategic reindustrialization programs, yet structural fragilities. Success depends on profoundly integrating the innovation system, labor inclusion, infrastructure investment, and green technology. As such, the automotive industry remains a decisive testing ground for the country's new industrial strategy.

3.2 Renewable Energy Industry

Renewable energy holds a central place in Brazil's industrial and environmental strategies. Decades

of state-led infrastructure and technological investments have made hydropower the country's primary energy source, establishing Brazil as one of the nations with the cleanest energy matrices globally. In recent years, driven by growing environmental concerns and a persistent pursuit of energy autonomy and diversification, wind and solar power have also emerged as key pillars of Brazil's energy mix. Between 2014 and 2023, Brazil installed an average of 2.7 GW per year and ranked third globally in new onshore capacity in 2023. By 2024, solar power accounted for 19.8% of the national electricity mix, second only to hydropower (46.4%).

Brazil has employed various policy instruments to support renewable energy development. In the wind power sector, the Program for Incentives to Alternative Sources of Electric Energy (Proinfa), created in 2002, marked the first structured policy targeting wind power. Since 2004, the government has begun contracting renewable energy through auctions, which increased competition among producers and reduced tariffs. The local content and domestic manufacturing entity requirements introduced by BNDES are decisive for industrial development, not only advancing manufacturing localization but also attracting leading global manufacturers. Furthermore, state governments have provided additional incentives to build regional industrial clusters, and tax exemptions and tariff reductions have enhanced the financial support system. In the solar energy sector, the FINAME Solar line provides long-term credit at favorable interest rates for equipment with national content. The Inova Energia Joint Support Plan, created by BNDES, FINEP, and ANEEL, supports R&D for wind turbine technology adapted to Brazilian conditions. The Climate Fund, under the Ministry of the Environment, finances projects to mitigate greenhouse gas emissions, including solar initiatives. In addition, the Support Program for the Technological Development of the Semiconductor Industry provides tax exemptions for photovoltaic module and cell production.

Despite significant achievements, Brazil's renewable energy sector also faces challenges. The solar sector still relies heavily on imported inputs and equipment, while the absence of a solar-grade silicon industry limits value creation and industrial autonomy. Key opportunities for Brazil's development lie in breakthroughs in offshore wind and energy storage technologies, as well as green hydrogen production. Expanding research and production capabilities in these areas would enhance Brazil's role in the BRICS and global low-carbon markets. The next stage requires a comprehensive national renewable industrial strategy that aligns energy transition, climate goals, and industrial development priorities. Priorities include predictable regulation for investors, domestic component production, expanded transmission networks, and public procurement to stimulate demand. Developing a coherent renewable energy industrial strategy is crucial for Brazil to transform its natural resource endowments into technological autonomy and inclusive growth.

3.3 Aerospace Industry

The development of the aerospace sector reflects Brazil's longstanding efforts to integrate scientific research, industrial policy, and international cooperation. Alongside Mexico, Brazil has one of the most advanced aerospace industries in Latin America. In 2024, the aviation industry accounted for 1.5% of Brazil's GDP, and exports of aircraft and related parts represented 1.1% of Brazil's total exports. Despite its small share, the technological complexity and spillovers of this sector positively affect other industrial areas.

The aerospace sector was integrated into Brazil's industrial modernization strategy as early as the developmentalist era. The sector covers research, development, manufacturing, maintenance, and

operation of aircraft, rockets, satellites, and related technologies; and includes commercial aviation, defense, and space exploration, as well as the production of complex technological systems and components. To strengthen Brazil's international presence, the "Aerospace Brazil" brand was launched to promote the sector abroad and expand its participation in global value chains. A major recent initiative was the creation of ALADA, a state-owned aerospace company focused on developing and commercializing aerospace technologies. Missions such as "Amazonia 1" have consolidated Brazil's leading position in remote sensing and national satellite integration capabilities. Additionally, regional collaboration and South-South Cooperation play significant roles in Brazil's aerospace policy. Cooperation within the BRICS framework and partnerships with Latin American countries have reinforced Brazil's commitment to technological exchange and data sharing for sustainable development.

Brazil's aerospace sector both exhibits progress and faces challenges. The combination of domestic research capabilities, industrial potential, and cooperation experience forms a strategic advantage. However, the over-concentration of technological and productive capacities in one company limits industrial diversification and resilience. Dependence on imported components and limited domestic production capacity also constrain sectoral development. Strengthening local suppliers and diversifying production remain key challenges for consolidating a more autonomous and integrated aerospace industry. Sustaining the sector's positive momentum requires stable public funding, effective inter-agency coordination, and continuous support for innovation. These elements are crucial for ensuring that space technology continues to contribute to development, environmental monitoring, and regional integration.

4.
POLICY RECOMMENDATIONS

4.1
Reorient Macroeconomic Policy to Support Reindustrialization

Reindustrialization requires a policy mix that ensures stability while actively supporting productive investment. Brazil should move beyond the neoliberal macroeconomic framework centered on high interest rates, exchange-rate volatility, and fiscal austerity. Reducing external vulnerability calls for managing capital flows, stabilizing the exchange rate, and fostering long-term industrial growth.

4.2
Rebuild State Capacity for Planning and Coordination

The state's role should evolve from a passive regulator to a strategic coordinator of productive transformation. Industrial policy could be integrated into a comprehensive development strategy encompassing the education system, R&D and innovation, and a public credit system oriented towards industrial diversification. It is critical to strengthen federal, state, and municipal capacities and ensure interministerial and cross-sectoral coordination. Platforms like the National Industrial Development Council and instruments like the NIB could be supported with technical expertise, transparency, and participatory governance.

4.3
Overcome the Contradiction Between Monetary Policy and Industrial Strategy

Brazil should align its monetary policy with its productive development goals. The persistence of high interest rates discourages long-term financing, undermines innovation, and reinforces the financialization of the economy. This creates a structural contradiction: while the government promotes industrial transformation through unprecedented volumes of public investment, the macroeconomic framework continues to privilege financial accumulation over productive investment. A coherent development strategy should reconfigure the role of credit, ensure access to long-term financing, and break with the logic of financial accumulation as the cornerstone of macroeconomic stability.

4.4

Condition Public Incentives on Social, Environmental, and Technological Commitments

Public financing, subsidies, and tax incentives should be linked to clear outcomes: creation of quality jobs, reduction of territorial inequality, decarbonization, and local technological development. Industrial policy should be part of a broader sustainable development compact that centers on labor rights and environmental justice.

4.5

Leverage Public Financial Architecture for a Sovereign and Just Transition

Brazil's development banks (such as BNDES and FINEP), regional banks, and sovereign wealth funds should be mobilized to finance strategic sectors and enable productive transformation. Public investments could prioritize sectors with high potential for innovation and social return—including health, food security, mobility, clean energy, and digital infrastructure—while embedding conditions that prevent inequality and ecological harm.

4.6

Invest in Workforce Training and Digital Inclusion

A qualified and digitally connected workforce is needed. Brazil could expand investments in technical education, science and technology, and vocational training—especially in the Fourth Industrial Revolution technologies. Public policy should also address the digital divide to ensure broad-based participation in the green and digital transition.

4.7

Regionalize Industrial Policy and Promote Productive Integration in South America

Brazil needs to overcome its historically concentrated industrial model and promote decentralized development that builds on local economic potential. It could align with the South American regional industrial strategies to help extend strategic value chains and coordinate reindustrialization efforts. Brazil could spearhead the construction of coordinated South American value chains in sectors like health, biotechnology, and clean energy, strengthening regional integration and establishing technological cooperation mechanisms on the basis of equitable sovereignty.

4.8

Expand Productive and Technological Cooperation with China and Other Global South Countries Within the Context of Technological Transition and Multipolarity

China has consolidated advantages in green value chains (wind, solar, and batteries) and in general-purpose technologies (power electronics, applied AI, and smart manufacturing). Connecting to these technological hubs through joint ventures, co-financing, and shared R&D projects can shorten "time-to-frontier", raise domestic content, and build regional export capabilities to South American and African regional markets. BRICS instruments—especially the New Development Bank and the Partnership for the New Industrial Revolution—can lower the cost of capital, harmonize technical requirements, and enable shared infrastructure.

References

Alami, I. 2025, 'A reen Cold War', Break Down, 1 July. Available at: https://www.breakdown.org/post/a-green-cold-war.

ANFAVEA (Associação Nacional dos Fabricantes de Veículos Automotores) 2025, Anuário da Indústria Automobilística Brasileira 2025. São Paulo, ANFAVEA.

Bielschowsky, R. & Mussi, C. 2013, 'Padrões de desenvolvimento na economia brasileira: a era desenvolvimentista (1950–1980) e depois', in Padrões de Desenvolvimento Econômico (1950–2008): América Latina, Ásia e Rússia (Vol. 1), ed Bielschowsky, Brasília, CGEE.

BRICS Brasil no date, MDIC e MEMP integram o grupo consultivo do PARTNIR, que iniciou debates sobre interesses comuns no contexto da nova revolução industrial. Available at: https://brics.br/pt-br/noticias/mdic-e-memp-integram-o-grupo-consultivo-do-partnir-que-iniciou-debates-sobre-interesses-comuns-no-contexto-da-nova-revolucao-industrial.

Castro, A.B. 1994, 'Renegade development: rise and demise of state-led development in Brazil', in *Democracy, Markets and Structural Reform in Latin America: Argentina, Bolivia, Brazil, Chile and Mexico*, eds Smith, W. & Acuña, C., New Brunswick, Transaction Publishers.

Chomsky, N. and Pollin, R. 2020, *Climate crisis and the global green new deal: The political economy of saving the planet*, London, Verso.

Feijó, C., Feil, F. & Teixeira, F.A. 2024, 'Como superar os desafios da reindustrialização no contexto de transição climática', in *Reindustrialização Brasileira: Desafios e Oportunidades*, eds Teixeira, F. and Rodriguez, G., Rio de Janeiro, Letra e Imagem; REBRIP, Instituto Eqüit.

Fernandes, L. 2025, Interview with the authors, June.

Furtado, C. 1981, 'Estado e Empresas Transnacionais na Industrialização Periférica', *Re-*

vista de Economia Política, vol 1, no 1.

Furtado, C. 2007 [1953], *Formação econômica do Brasil.* São Paulo, Companhia das Letras.

Harvard Growth Lab 2024, Atlas of Economic Complexity. Available at: https://atlas.cid.harvard.edu.

Hermann, J. 2005a, 'Reformas, Endividamento Externo e o 'Milagre' Econômico', in *Economia Brasileira Contemporânea 1945–2004*, eds Giambiagi, F. et al., São Paulo, Campus.

Hermann, J. 2005b, 'Auge e Declínio do Modelo de Crescimento com Endividamento: o II PND e a Crise da Dívida Externa (1974–1984)', in *Economia Brasileira Contemporânea 1945–2004*. eds Giambiagi, F. et al., São Paulo, Campus.

Hitner, V. and Castro, A.C. 2024, 'O processo de formulação da Nova Indústria Brasil (NIB): política orientada por missões e participação social no desenho do Plano de Ação da NIB', *Revista Tempo do Mundo*, vol 36, pp. 29-56.

Marini, R.M. 2005 [1973], 'Dialética da Dependência', in Ruy Mauro Marini: Vida e Obra, eds Traspadini, R. & Stedile, J.P., São Paulo, Expressão Popular.

Mineiro, A. 2024, 'Desenvolvimento, Reindustrialização e Integração Regional', in *Reindustrialização Brasileira*, ed Teixeira, F., Rio de Janeiro, REBRIP.

Morceiro, P.C. and Guilhoto, J.J.M. 2023, Desindustrialização Setorial no Brasil. São Paulo, Instituto de Estudos para o Desenvolvimento Industrial (IEDI).

Nassif, A. 2024, 'Nova Indústria Brasil: Uma avaliação crítica da nova política industrial brasileira', *Revista Brasileira de Comércio Exterior*, vol 158, no Jan.–Mar, pp. 47-54.

Nova Indústria Brasil 2025, Plano de ação para a neoindustrialização 2024–2026. Brasília, Governo Federal.

Pamplona, N. 2025, 'Petrobras tenta atrair China para revitalizar estaleiros brasileiros', Folha de S.Paulo, 5 July, Mercado section. Available at: https://www1.folha.uol.com.br/mercado/2025/07/petrobras-tenta-atrair-china-para-revitalizar-estaleiros-brasileiros.shtml.

Squeff, G.C. 2012, *Desindustrialização: Luzes e Sombras no Debate Brasileiro.* Brasília, IPEA.

Tavares, M. da C. 2011 [1972], 'O processo de substituição de importações como modelo de desenvolvimento na América Latina: o caso do Brasil', in *Desenvolvimento e Igualdade: Edição especial Maria da Conceição Tavares*, eds Côrrea, V.P. & Simioni, V., Rio de Janeiro, IPEA.

Teixeira, F. 2025a, Interview with the authors, Rio de Janeiro.

Teixeira, F. 2025b, 'Como Impulsionar Políticas Industriais Sustentáveis nos Países BRICS no Atual Contexto Global', in *BRICS+ e o Futuro Soberano do Sul Global*, coord. Rodriguez, G., Rio de Janeiro, Instituto Eqüit; REBRIP.

Vergnhanini, R. & Onoda, S. 2024, 'Desindustrialização brasileira no século XXI: introduzindo o papel da demanda doméstica', *Economia e Sociedade*, vol 33, no 2.

Villela, A. 2005, 'Dos "Anos Dourados" de JK à Crise Não Resolvida (1956-1963)', in *Economia Brasileira Contemporânea 1945-2004*, eds Giambiagi, F. et al., São Paulo, Editora Campus.

Zanovelo, R.C. 2024, A Nova Indústria Brasil e a Reconstrução do Papel do Estado no Desenvolvimento: Coordenação, Capacidades e Desafios Institucionais. Master's dissertation. Fundação Getulio Vargas (FGV-EAESP).

Introduction to the Global South Research Center

The Global South Research Center (GSRC) was announced by Chinese President Xi Jinping at the Conference Marking the 70th Anniversary of the Five Principles of Peaceful Coexistence in June 2024, and formally launched in March 2025.

The GSRC is an international research platform involving experts and scholars from South and North countries and international organizations. The GSRC's primary responsibilities are to consolidate research resources from around the world, particularly from Global South countries and relevant international and regional organizations, and to carry out research, consultation, and exchange activities concerning key and major issues related to the development and cooperation of the Global South.

The GSRC establishes a Council, chaired by the Minister of the Development Research Center of the State Council (DRC) Lu Hao. The Secretariat of the Council is hosted at the Center for International Knowledge on Development (CIKD).

Council of the GSRC

CHAIRMAN

Lu Hao	Minister of the Development Research Center of the State Council, Chairman of the GSRC Council

VICE CHAIRPERSON

Zhang Qi	Vice Minister of the Development Research Center of the State Council, Vice Chairperson of the GSRC Council

COUNCIL MEMBERS

Yose Damuri	Executive Director of Centre for Strategic and International Studies (CSIS) Indonesia

Kishore Mahbubani	Former Singapore Ambassador to the United Nations
Assel Sarsenbayeva	Chairman of the Management Board, Economic Research Institute (ERI) of Kazakhstan
Osama El Gohary	Assistant to the Prime Minister of Egypt and Chairman of the Information and Decision Support Center (IDSC)
Arkebe Oqubay	Former Senior Minister and Special Adviser to the Prime Minister of Ethiopia; British Academy Global Professor at SOAS University of London
Elizabeth Sidiropoulos	Chief Executive of the South African Institute of International Affairs (SAIIA)
Luciana Servo	President of the Institute of Applied Economic Research (IPEA) of Brazil
Fyodor Voytolovsky	Director of the Primakov National Research Institute of World Economy and International Relations of the Russian Academy of Sciences (IMEMO)
Peter Nolan	Founding Director of the Center for Development Studies at the University of Cambridge
Carlos Oya	Head of the Department of Development Studies and Professor of Political Economy of Development at SOAS University of London
Dani Rodrik	Ford Foundation Professor of International Political Economy at the Harvard Kennedy School
Kaushik Basu	Former Senior Vice President and Chief Economist of the World Bank, Carl Marks Professor of International Studies at Cornell University
Kevin Gallagher	Director of the Center for Global Development Policy at Boston University
Carlos Correa	Executive Director of the South Center
Pedro Manuel Moreno	Deputy Secretary-General of UN Trade and Development (UNCTAD)
Zhou Qiangwu	Vice-President and Chief Administrative Officer of the New Development Bank (NDB)
Tetsuya Watanabe	President of the Economic Research Institute for ASEAN and East Asia (ERIA)
Clarems Endara	Permanent Secretary of Latin American and Caribbean Economic System (SELA)
Federico Bonaglia	Deputy Director of the OECD Development Center
Zhao Zhongxiu	President of the University of International Business and Economics (UIBE)
Ye Hailin	President of the China-Africa Institute (CAI)
Chai Yu	Director-General of the Institute of Latin American Studies in the Chinese Academy of Social Sciences (CASS)

SECRETARY GENERAL

Wang Jinzhao	Executive Vice President of Center for International Knowledge on Development, Secretary General of the GSRC Council

Contact: Zhu Qingyi, zhu.qingyi@cikd.org


GSRC
全球南方研究中心
Global South Research Center