EXECUTIVE SUMMARY

SHAPING BRAZIL'S ENERGY TRANSITION: KEY ACTORS, NARRATIVE, AND GLOBAL ENGAGEMENT (2024-2025)

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Argentina [1.5]

The biggest challenge of the energy transition is to make it fair

The World Meteorological Organization (WMO) has confirmed that 2024 was the warmest year on record, with the average global temperature approximately 1.55°C above pre-industrial levels (WMO, 2025). While this single data point does not signify a breach of the Paris Agreement's goal, the world is demonstrably nearing the threshold of a 1.5-degree increase in the global average temperature. Concurrently, the energy sector, still dominated by fossil fuels, remains the primary driver of global temperature rise.

Recognizing the profound environmental implications of exceeding the planetary survival limit, the UN Secretary-General has urged immediate action to phase out fossil fuel dependence and escalate investment in renewable energy to avert a climate catastrophe. Addressing the General Assembly on his priorities for 2025, he directly appealed to the leadership of the major G20 economies, underscoring the sheer magnitude of their emissions (United Nations, 2025).

In this context, the G20 has articulated strong support for a just energy transition in recent annual leaders' declarations (G20 New Delhi Leaders' declaration, 2023; G20 Brazil Leaders' declaration, 2024; G20 2025 South Africa Presidency). The working agendas of this grouping over the past three years (2023, 2024, 2025) have been shaped by key emerging economies and BRICS Forum members – India, Brazil, and South Africa – in their capacity as host nations. This highlights the significance attributed to climate change and energy transition by major emerging countries. The year 2025 presents a unique opportunity for Latin America, as Brazil will host both the annual BRICS Forum meeting and the Conference of the Parties (COP30) to the United Nations Framework Convention on Climate Change, potentially fostering an energy transition centered on the right to accessible, clean, and renewable energy. This transition should prioritize those whose pre-existing vulnerabilities exacerbate their susceptibility to a transition that could deepen inequalities, thus necessitating a just energy transition grounded in territorial and community realities and addressing climate change impacts through a climate justice lens.

The compatibility of the energy transition outlined in the international agenda with a just transition for developing countries remains a critical question. The mainstream energy transition primarily entails a shift in energy supply from fossil fuels to renewable sources such as wind, solar, hydro, geothermal, and green hydrogen. Meanwhile, natural gas is considered by various nations and stakeholders as a transitional hydrocarbon due to its comparatively lower emissions than coal or oil. Simultaneously, nuclear energy's role in the transition elicits both support and opposition, lacking a definitive consensus.

The ongoing transition necessitates substantial quantities of critical minerals, whose reserves are significantly more geographically concentrated than global oil and gas deposits. Furthermore, the extraction and production of these minerals are largely monopolized by a single actor: the People's Republic of China. Major global energy consumers (China: 4,060 Mtoe; United States: 2,172 Mtoe; India: 1,135 Mtoe) have deployed their energy diplomacy to both meet the objectives of the Paris Agreement and avoid being marginalized in the 'clean energy race'. The definition of global value chains in energy production will undoubtedly shape the future global economy.

The transition from fossil fuel-dominated energy consumption to reliance on mineral-extraction companies risks creating new sacrifice zones, potentially perpetuating the existing cycle of wealth concentration, dividends, and environmental degradation that currently drives market demand. Major oil companies are increasingly investing in renewable energy, framing the transition as an augmentation of the current energy landscape rather than a fundamental transformation. However, this raises critical questions extending beyond mere decarbonization to encompass the transformation of our production methods and our interaction with the economy and nature (Svampa & Bertinat, 2021: 13).

Consequently, developing countries face a simultaneous triple challenge: elevating their development levels and social inclusion; decarbonizing their economies; and adapting their ecosystems, populations, and livelihoods to a changing climate with increasing impacts and risks, all while avoiding the inequitable burden of the social and environmental costs of an unjust transition. The adverse effects of climate change are already compromising the energy security of current energy supply systems in the Global South, as evidenced by prolonged droughts that have curtailed hydropower provision in countries like Uruguay, Brazil, and Argentina.

Brazil stands at a crucial juncture: either perpetuating the mainstream energy transition championed by the world's largest energy-consuming nations, positioning the Global South as a reservoir of critical minerals and a transitional fossil fuel supplier, as well as a provider of raw materials; or spearheading a just transition. A just energy transition entails decarbonizing economies and safeguarding biomes for future generations, while also potentially fostering a more autonomous approach to the transition within an unfavorable international geopolitical context.

Conceiving of a just transition solely from a governmental perspective is inherently limited. Therefore, understanding the roles of diverse stakeholders in advocating for different transition models is paramount, particularly for Brazil this year. Within this context, which Brazilian stakeholders exert significant

influence in shaping the domestic narrative surrounding the energy transition? How are disparate viewpoints reconciled? What narratives dominate Brazilian diplomacy regarding the energy transition within the BRICS Forum, the G20, and the COP? This report endeavors to identify the key stakeholders influencing energy transition narratives in Brazil and analyze their positioning on the international stage.

The process of reconciling the oil producer profile with building climate leadership

From the beginning of Lula da Silva's third term in office in January 2023, the government's interest in recovering Brazil's regional leadership as a platform to strengthen its international role, particularly on environmental issues, became clear. Lula prioritised on the national and regional agenda the urgency of addressing climate change, sustainable development, and energy transition (Discurso do Presidente Lula no Congresso Nacional, 2023; Discurso do Presidente da República Luiz Inácio Lula Da Silva na abertura da VII reunião de cúpula da CELAC, 2023).

Brazil has ascended to the position of a significant global energy player, driven by its increasing energy consumption and production. Latin America's largest economy ranked as the sixth-largest energy-consuming country in the world (Statista, 2025). Notably, Brazil possesses a highly diversified energy matrix compared to its BRICS counterparts and the major economies of the G20, largely attributed to the substantial role of renewable energies sources. Indeed, it stands as the world's second-largest producer of both biofuels and hydropower (IEA, 2023). The nation's extensive hydropower infrastructure accounts for 80% of its domestic electricity generation, providing the electricity system with considerable operational flexibility (IEA, 2013: 303). However, the impact of climate change in recent decades, manifesting in altered rainfall patterns and prolonged droughts, has underscored the vulnerability of the country's energy supply system. Consequently, there is an urgent need to expedite the planning and implementation of adaptation strategies for vulnerable cities and regions.

Brazil is currently the seventh largest emitter of greenhouse gases (GHG) globally, so it has an important role to play in the fight against climate change. Unlike the trend observed in other emerging energy players such as China or India, Brazil uniquely sees the emissions from Land Use, Land-Use Change, and Forestry (LULUCF) exceeding those from its energy sector (Climate Action Tracker, 2025). Nevertheless, the transport and industrial sectors are driving a growing demand for hydrocarbons, particularly oil derivatives.

Table 1. Brazil's energy and climate profile

	Indicator	Key information
🌍	Global position in energy consumption	The sixth most energy-intensive country in the world
🛢️	Main energy source	Oil (36,7%)
🌱	Second energy source	Biofuels (33%)
🚗	Largest energy consuming sector	Transport (37%), followed by industry (34%)
👤	Energy consumption per capita	Brazil ranks 95th (USA: 10th and China: 38th)
🌾	Biofuel production	2nd largest producer in the world
💧	Hydroelectric production	2nd largest producer in the world
⚡	Electricity generation	80% comes from large hydropower plants
🛢️📦	Oil reserves	Brazil ranks 12th worldwide
🛠️	Oil production	9th largest oil producer in the world
🌫️	GHG emissions	7th largest emitter in the world
🧮	Emissions per capita	Brazil: 1.922 TCO_2 (US.: 13.813 // China: 7.515)
🌳	Main source of emissions	LULUCF > energy sector
🔥	Main cause of emissions	Fuel combustion

Elaborated with data extracted from IEA; Climate Tracker and Statista.

Fueled by increasing domestic demand for fossil fuels, Brazil has solidified its position as a leading oil producer in the 21st century. The discovery of pre-salt oil reserves propelled the country into the top ten producers, ranking ninth worldwide and first in Latin America (Statista, 2025). The announcement of the Tupi field discovery on November 8, 2007, since known as 'pre-salt', revealed estimated reserves of 8 to 100 billion barrels of oil, equivalent to 66% of Brazil's proven reserves. This volume positioned the country among the twelve largest oil holders in the world globally and triggered a 14% surge in Petrobras' shares - Brazil's state-owned oil company -increasing its market value to $221 billion (Oliveira & Goldbaum, 2013: 222-223 and 225). Subsequently, Lula Da Silva's administration implemented a shift in the oil exploitation model, increasing state intervention through mandatory Petrobras participation in all future tenders. The initial proposal by the Partido dos Trabalhadores (PT) aimed to export pre-salt crude to develop the domestic oil derivatives industry and foster national development. Historically the Brazilian oil industry has relied on refining imported light and ultra-light oil, whereas pre-salt oil is heavy and ultra-heavy, primarily destined for export (Dussort, 2022). Currently, the downstream sector remains an unresolved challenge.

During Lula Da Silva's initial two terms (2003-2010) and Dilma Rousseff´s subsequent term (2011-2014), the development of biofuels received a significant impetus amidst surging international oil prices, even as the hydrocarbon model was reinforced.

However, the economic and institutional crisis that has gripped Brazil since 2014 has led Brasilia to not only curtail its external engagement, but also witness the paralysis of numerous energy development projects (oil, hydroelectric, etc.) undertaken by state-owned enterprises (Tang, 2017). The process of privatizing state energy companies initiated by Michel Temer, intensified following Jair Bolsonaro´s ascent to power in 2019, resulting in an influx of foreign capital. Furthermore, policies promoting biodiesel consumption were dismantled, and the expansion of agribusiness was encouraged, contributing to increased GHG emissions in the South American nation.

The 2024-2025 period is of significant analytical interest as Brazil hosted the G20 in 2024, and will host the BRICS Forum and the Conference of the Parties (COP) to the United Nations Framework Convention on Climate Change (UNFCCC) in 2025. The agendas established in these international forums underscore the centrality of climate change and energy transition.

As proof of its leadership and as the incoming Presidency of the COP30, in 2024 Brazil submitted its NDC 3.0 to the Convention. Brazil reiterates its commitment to reduce its greenhouse gas emissions by 50% below its 2005 levels by 2030 as

a mitigation target, underpinned by maintaining over 80% renewables in electricity generation and a strong emphasis on expanding biofuels, particularly in the transportation sector, and energy efficiency. Hydropower is expected to remain a significant contributor, alongside the expansion of other renewables like solar and wind.

However, and as part of the tension between different readings of the transition, the NDC acknowledges a potential role for natural gas as a transitional fuel, but no specific quantitative targets for natural gas usage are set.

Other targets, including net-zero emissions by 2050, are conditional on international support. While specific quantitative targets for biofuels and energy efficiency at a granular level might be found in accompanying national plans, the core NDC sets the overarching direction for a renewable-heavy energy transition.

Methodology: stakeholders mapping

The information provided below is the result of the application of the stakeholder mapping tool. This methodology helps to list and identify the different social actors in a given territory with respect to the work objective set out, thus achieving an overall picture. From there, the level of relevance of each actor is analysed, as well as the relationship between the different actors identified, confirming networks or alliances between them. In addition, it enables the grouping of invisible actors and the potentialities they channel, and helps to identify or confirm the roles and scope of each actor.

For the purposes of this research, a stakeholder is someone who has a stake or interest in a policy, initiative, project or programme, with an identifiable level of influence. This implies that they have a high level of importance for situations to develop in a certain way, considering that they can obtain costs/benefits depending on the context. In this way, the mapping will provide insight into partnerships, alliances, conflicts and leaderships and help to select the most relevant actors according to the conjuncture.

The first step was to compute the main actors linked to Brazil's energy transition in the period 2024-2025 by drawing up a data matrix with the following classification criteria:

1. Name:
2. Category:

2.1 Governmental: Executive - Presidency; ministries and related agencies; Legislative; state banks and state-owned companies; states/provinces.

2.2 Private: companies; banks; public-private partnerships; civil society entities and think tanks.

3. Level of scope: national, provincial or local.
4. Institution's management
5. Contact name
6. Contact details
7. Information of interest

From there, the matrix grew by implementing a 'snowball' sampling (the links that appear in the analysis of one actor lead to the identification of other actors, generally in the same category) based on the reading and systematisation of primary and secondary sources. Finally, interviews with key informants on the record and off the record were carried out to confirm the relevance of the actors identified and the alliances presupposed.

The result (not exhaustive) was the identification of 137 actors involved in the energy transition narrative in Brazil with different levels of influence in the three international forums that were configured as case studies: G20, BRICS Forum and COP30.

In parallel, the following analysis was carried out:

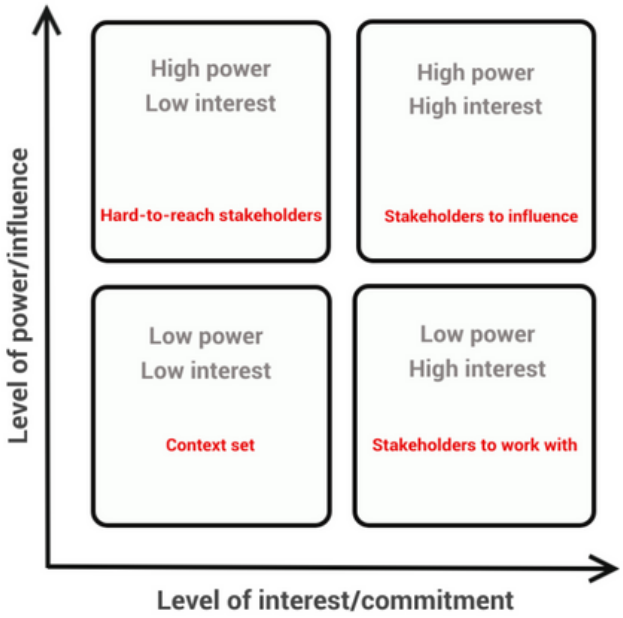
1. Level of interest and/or commitment to the objective
2. Level of power/influence in the international forum (G20; BRICS; COP30)
3. Degree of agreement or disagreement with the objective (the Just Energy Transition narrative)
4. Institutional mission and main activities
5. Relationship with other actors in the same grouping or with other sub-groups

It should be noted that the research results presented here are valid for the specified time frame, and may be modified according to the speed of change. This is based on the fact that 'reality is changing, the role and functions of certain actors can be modified, either by the presence of new actors, by changes in the context, or simply by changes in the actor himself' (Tapella, 2007: 5).

The results established for the three international fora are set out below, placing them on a Cartesian plane with two axes. The independent variable is the level of interest or commitment, and the dependent variable is the level of power or influence held by the actors identified. Thus, the four quadrants resulting from this logical scheme were classified into four categories, forming an original analytical scheme of their own:

1. stakeholders to influence
2. key stakeholders
3. hard-to-reach stakeholders
4. stakeholders to work with

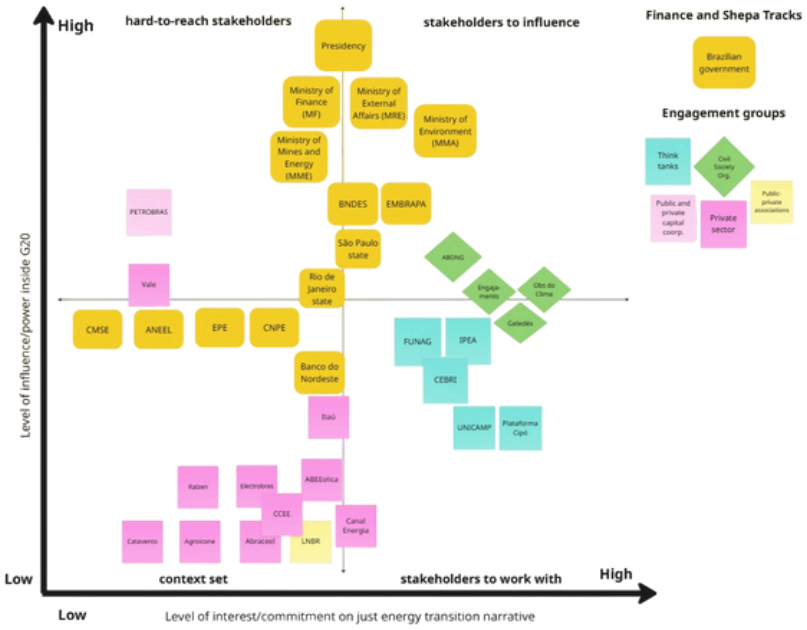
Figure 1. Influence and interest matrix



Source: Own work

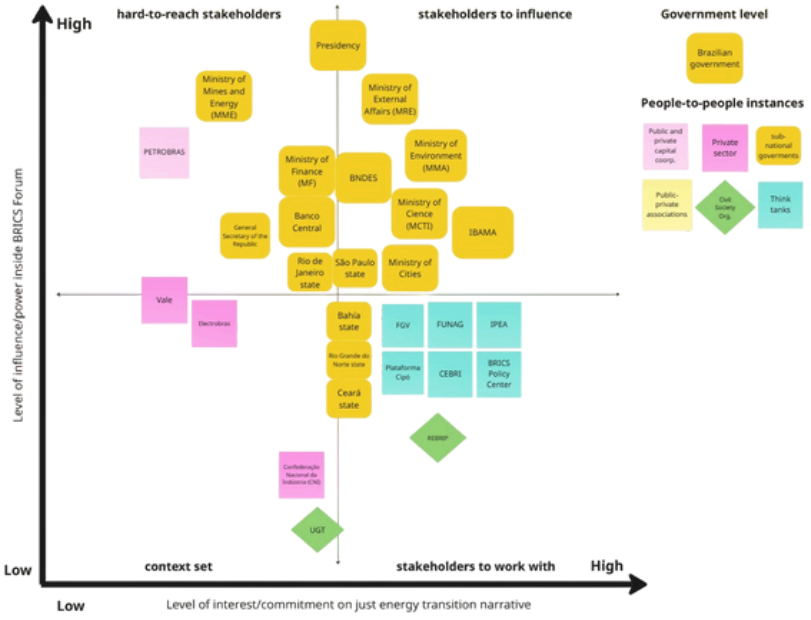
This classification allows to diagnose and assess the level of potential collaboration with key stakeholders appearing in the right quadrant.

Figure 2. G20 under Brazilian presidency (2024): Mapping Brazil's key stakeholders in the just energy transition narrative



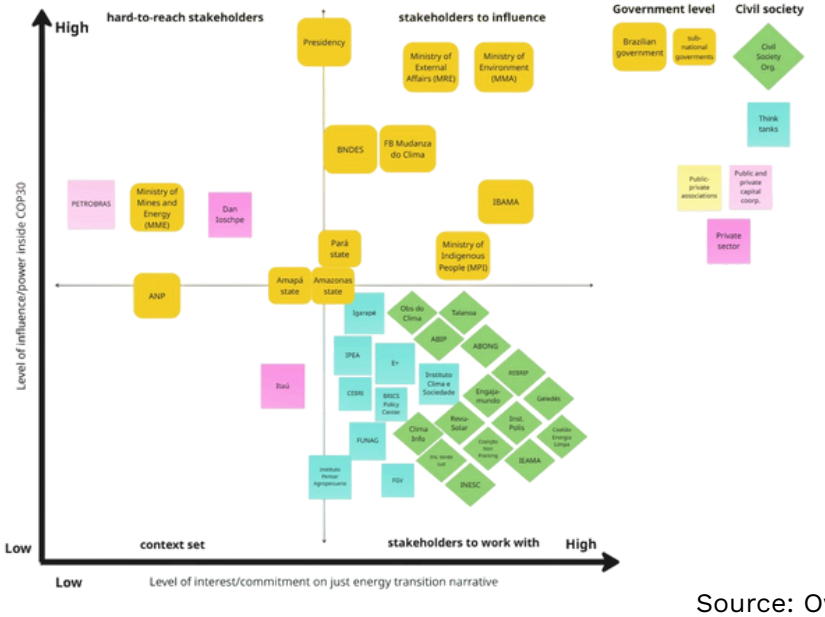
Source: Own work

Figure 3. BRICS Forum under Brazilian presidency: Mapping Brazil's key actors in the just energy transition narrative



Source: Own work

Figure 4. COP30 under Brazilian presidency (2025): Mapping Brazil's key actors in the just energy transition narrative



Source: Own work

*For further references on each of the actors, please see the full report.

To make the research results more operational, the tables show an average of 30-35 key stakeholders in the three fora analysed.

Stakeholder analysis

Stakeholders to work with

Environmental and climate civil society in Brazil has played a pivotal role in advocating for a just and sustainable energy transition. Since their emergence in the 1970s and their consolidation during the democratic transition of the 1980s, these organizations have challenged extractivist development models and championed the territorial rights of affected communities (de Pierro, 2020; Hochstetler and Keck, 2007). The 1990s, particularly following the Rio-92 Conference, witnessed the strengthening of civil society's participation in climate discourse, fostering its professionalization and thematic diversification (Viola, 2002; de Pierro, 2020).

During the first decade of the 21st century, climate change became a central tenet of socio-environmental activism, with organizations adopting technical and strategic approaches. Furthermore, the achievement of the Paris Agreement spurred many organizations to incorporate the climate justice framework (Cândido Fleury et al., 2019). Under Jair Bolsonaro's administration (2019-2022), characterized by denialism and environmental deinstitutionalization, civil society assumed a role of active resistance (de Souza, 2024).

The return of Lula da Silva to the presidency in 2023 saw the reopening of dialogue channels with civil society and the reactivation of key policies, such as the Amazon Fund and engagement in multilateral initiatives. Nevertheless, the stance of socio-environmental organizations has remained one of active vigilance and constructive criticism.

Fourteen civil society organizations have been identified as significantly relevant to the construction of narratives surrounding just transition and energy transition. As evidenced in the tables above, most exhibit greater activity within the COP30 framework. Activity is slightly reduced at the G20, while participation is significantly lower at the BRICS Forum.

Based on the mapping conducted, the majority of actors in the lower right quadrant comprise non-profit organizations and coalitions dedicated to combating climate change and, more specifically, promoting the country's energy transition. Their primary activities involve knowledge generation and advocacy within national climate policy, and in some instances, on the international stage.

Notable examples include Observatório do Clima, Instituto Talanoa, Instituto de Energia e Meio Ambiente (IEMA), Instituto Internacional Arayara, Instituto de Estudos Socioeconômicos (INESC), O Clima de Política, Instituto Clima e Sociedade (ICS), Associação Brasileira de ONG (ABONG), ClimaInfo, Coalizão Não Fracking Brasil, and Coalizão Energia Limpa.

Secondly, organizations focused on youth engagement, such as Engajamundo and Instituto VerdeLuz, are present. Regardless of their current level of influence, their presence in forums like the G20 or the COP is considered pertinent, as they contribute to amplifying the voice of Brazilian youth in crucial debates concerning a just energy transition in Brazil.

Organizations dedicated to defending human rights and vulnerable populations in Brazil, particularly those impacted by climate change, have also been identified. These include Articulação dos Povos Indígenas do Brasil (APIB), Rede Brasileira para a Integração dos Povos Indígenas do Brasil (REBRIP), RevoluSolar, and Geledés - Instituto da Mulher Negra. While acknowledging progress in climate governance, these organizations also highlight discrepancies between discourse and practice, particularly concerning the expansion of the oil frontier, such as in the Amazon Mouth region (Greenpeace Brazil, 2023). Consequently, civil society has advocated for the development of a genuine National Plan for a Just Energy Transition, with the effective inclusion of affected territories and actors. Demands for greater coherence in public policies and a decisive break from the centralized and extractivist energy model historically prevalent in the country have been articulated (Rede Brasileira de Justiça Ambiental, 2023).

The fundamental role of Brazilian civil society in driving the country's energy transition cannot be overstated. This is achieved through advocacy, influencing public policy design and implementation, demanding enhanced transparency in energy projects, denouncing adverse environmental impacts, corruption, and human rights violations (especially in hydroelectric megaprojects and fossil fuel exploitation in regions like the Amazon), and promoting renewable energies as a pathway to decarbonization.

Within the same sphere, Brazilian think tanks have been deeply involved in the socio-political and cultural dynamics of Brazilian society over recent decades, supporting various presidents and aligning with different coalitions following the country's redemocratization.

The mapping exercise identified fifteen academic think tanks currently dedicated to research lines analyzing negotiations within the three areas under consideration: BRICS, G20, and COP30. A disaggregated view reveals fourteen institutions involved in BRICS monitoring, 8 primarily focused on the G20, and

twelve dedicated to the study of COP30. However, beyond this broad overview and aligning with the project's objectives, certain entities exert varying levels of impact on energy transition diplomacy. Thus, the analysis focuses on a primary group of six prominent think tanks with a well-established track record in monitoring Brazilian foreign policy in general, and consequently, demonstrating a significant role in addressing climate change, sustainable development, and energy transition on the national agenda. These six key study centers include Instituto de Política Econômica Aplicada (IPEA), Fundação Alexandre Gusmão (FUNAG), Fundação Getulio Vargas (FGV), Centro Brasileiro de Relações Internacionais (CEBRI), Fundação Fernando Henrique Cardoso (FHC) and BRICS Policy Center. Both FUNAG and IPEA, as state entities linked to the Brazilian national government, initially aimed to shape strategies for designing and executing foreign policy actions, suggesting a greater level of influence within these frameworks compared to others.

A secondary group of think tanks also plays a significant role in positioning energy transition as a relevant topic for multilateral discussion. These five academic entities – E + Transição Energética, Plataforma CIPÓ, Observatório de Minería, Instituto Igarapé, and Instituto Pensar Agropecuária (IPA) – are relevant due to their specific expertise and their spheres of action and influence more exclusively dedicated to energy and/or environmental issues.

Key data illustrating the level of influence of the aforementioned actors include:

- IPEA chairs the BRICS Think Tank Council and the BRICS Finance Think Tank Network in 2025.
- ABONG chaired the C20 during Brazil's G20 presidency in 2024.
- Plataforma CIPÓ, E+ Transição Energética, Observatório do Clima, Instituto Clima e Sociedade, and Engajamundo were facilitators and co-facilitators of the C20 and T20 during Brazil's G20 presidency in 2024.
- CEBRI, FUNAG, and IPEA were coordinators at the T20 during Brazil's G20 presidency in 2024.

Stakeholder to influence

The top two quadrants are predominantly occupied by governmental actors, reflecting the fact that two of the three case study instances are informal governmental groupings (G20 and BRICS Forum), while the COP convenes UNFCCC member countries. However, both the COP and the G20 have broadened their engagement to incorporate institutional bodies for civil society inclusion. More recently, the BRICS Forum has also adopted this orientation, supporting People to People (P2P) initiatives during Brazil's 2025 presidency.

Across all three international bodies, a cohort of governmental actors wielding significant power and influence can be observed, although their commitment to the just energy transition narrative ranges from medium to medium-high. This group comprises the Presidency, the Ministry of Foreign Affairs (MRE), the Ministry of Environment and Climate Change (MMA), and the Brazilian Institute of Environment and Renewable Natural Resources (IBAMA).

The Presidency plays a pivotal role in energy diplomacy and in shaping the promotion of energy transition stances within international fora and with Brazil's external partners. In his recent pronouncements, President Lula has articulated two key positions: Brazil as an environmental leader and as a major global oil producer. While stating in 2023 that 'Brazil will be the Saudi Arabia of green energy' (Statement by President Luiz Inácio Lula da Silva during the Brazil-Saudi Arabia roundtable, 2023), he recently qualified this by emphasizing that Brazil's energy transition is contingent on oil wealth (Da Silva in Verdélio, 2025).

The MRE is the next most influential actor, although the Ministry of Mines and Energy (MME) and the MMA also demonstrates significant engagement. Notably, the MRE houses a Climate, Energy and Environment Secretariat, organized into three departments. This Secretariat has been led by Ambassador André Aranha Corrêa do Lago since 2023, who coordinated the G20 working group on environmental and climate sustainability in 2024 and was appointed chair of COP30 in 2025. Also noteworthy is Ambassador Chagas de Moura, Director of the Climate Department (formerly within the Secretariat), who serves as the lead negotiator at the UNFCCC.

In early 2024, Corrêa do Lago cautioned against discrepancies in Brazil's energy transition narrative, particularly concerning offshore oil and gas exploration in the Amazon River delta. Subsequent statements by the minister clarified that no such disagreements existed between the environmental agenda and oil exploration in the Amazon Mouth region (O Globo, 2025, 2025), aligning with the President's discourse. This issue constitutes a primary point of contention between the MME and the MMA, resulting in conflicting narratives regarding the advocated type of transition.

The MMA is directly involved in the organization of COP30, collaborating with the MRE. Minister Marina Silva has positioned herself against oil exploration in the aforementioned region, asserting that the issue is technical, not political (Barreto, 2025), thereby implicating IBAMA, an autonomous body linked to the MMA responsible for granting environmental licenses for projects within its purview. Amidst this exchange of statements, the MME minister accused IBAMA's director, Rodrigo Agostinho, of delaying the decision on the exploration license for Petrobras in the disputed region until after COP30 (ClimaInfo, 2025).

At the national level, the Ministry of Finance (Ministério da Fazenda) is involved in the Brazilian Green Transformation Plan, managing the Eco-Invest initiative to facilitate the attraction of foreign direct investment. Regarding diplomatic efforts, the ministry was directly engaged in the G20 in 2024 and in the preparatory meetings for the 2025 BRICS summit.

The Brazilian Development Bank (BNDES), a public federal financial institution and the government's primary instrument for long-term financing (linked to the Ministry of Development), also stands out within this group of actors. Similar to other institutions, post-2023 saw restructurings, including the creation of the Climate Department within the Energy and Climate Transition Area. Notably, since 2009, the bank has managed the Climate Fund (Fundo Clima), linked to the Ministry of Environment. The latest modification to this program by decree in 2023 added new financing avenues for mitigation and adaptation projects, including energy transition initiatives such as the production of hydrogen from renewable energy sources. The Brazilian government, through BNDES, negotiates international financing from entities such as the Development Bank of Latin America and the Caribbean (CAF) and the New Development Bank of BRICS (NBD). In 2023, CAF and BNDES signed a memorandum of understanding including a US$650 million credit line to finance energy integration and transformation projects, as well as renewable energy (solar, wind, and green hydrogen) (CAF, 2023).

Furthermore, the Ministry of Indigenous Peoples (MPI), led by Sônia Guajajara, while considered to have less direct influence on energy policy, plays a strategic role in ensuring the legitimacy, equity, and sustainability of the process, particularly if Brazil seeks to position itself as a leader in a just energy transition. Under Minister Guajajara's leadership, the MPI promoted the creation of an International Indigenous Commission, officially launched in April 2025 during the Terra Livre Camp (ATL), to strengthen its participation in the COP30 climate negotiations, in coordination with the Ministry of Foreign Affairs and influential indigenous organizations such as the Articulação dos Povos Indígenas do Brasil (APIB) (Vilela, 2025). Guajajara has also stated Brazil will advocate for developed countries to directly fund indigenous peoples for their historical contribution to environmental protection and emphasized the importance of channeling these resources into inclusive public policies (Infobae, 2025). However, their ability to effectively influence key decisions still faces significant political constraints.

With lesser influence in energy diplomacy, the Ministério da Ciência is heavily involved in the implementation of the National Energy Transition Policy, and the Ministério do Desenvolvimento chairs the Low Carbon Industry Technical Committee. These latter two are also tangentially involved in the country's energy diplomacy. The Empresa Brasileira de Pesquisa Agropecuária (EMBRAPA) and the

Ministry of Agriculture are directly linked to agro-energy, specifically the promotion of ethanol and biodiesel. Externally, their performance is significant within the preparatory meetings for the BRICS Forum in the Agriculture working group.

Regarding sub-national actors, they are situated in the center of the four quadrants. In fact, three distinct groups can be identified based on their level of power and commitment to the topic. Firstly, São Paulo exhibits the greatest level of power and influence due to its economic and political weight at the national level. In terms of its commitment to a just energy transition, it has a track record of considerable policy deployment and governmental initiatives, as well as significant diplomatic activism. In this context, the BRICS Association of Cities and Municipalities is chaired by the Associação Brasileira de Municípios (ABM), represented by its 1st Vice-President, Adinan Ortolan, who also presides over the Associação dos Municípios de Médio e Pequeno Porte do Estado de São Paulo (AMPPESP). The State of São Paulo faces the challenge of accelerating its transition plans within a socio-productive industry (particularly the industrial and transport sectors) highly dependent on carbon-intensive energy. Consequently, the presence of climate denialists and/or climate action delayers, who question these initiatives as inopportune or costly, cannot be disregarded.

Slightly further to the left is the state of Rio de Janeiro, primarily associated with the prominence of its oil and gas industrial complex, which accounted for 85.6% of Brazilian oil production and 72.3% of natural gas production.

Secondly, with a lower level of influence compared to the two preceding states and a medium-low commitment to the energy transition, are Amapá, Pará, and Amazonas. The state of Pará holds political-diplomatic relevance due to its role as the host venue for COP30. Aligning with the presidential narrative, the executive branch leaders of Amapá and Pará – with Amapá adopting a more open and firm stance of support – have encouraged the advancement of the oil exploitation project on their coasts.

The third group, comprising Rio Grande do Norte, Bahia, and Ceará, exhibits a low level of diplomatic influence, although their commitment to the energy transition is medium. These three states have, in recent years, implemented numerous actions aimed at securing political, technical, and, above all, financial support for various projects focused on renewable energy generation, particularly wind and photovoltaic sources. Notably, Rio Grande do Norte, Bahia, and Ceará have received financing lines from the New Development Bank (NBD) of the BRICS.

Hard-to-reach stakeholders

The prominent figure of the Ministry of Mines and Energy (MME), Minister Alexandre Silveira, has openly advocated for oil exploitation in the Amazon Mouth region (ClimaInfo, 2025). In February 2025, upon announcing Brazil's impending OPEC+ membership, he asserted that no contradiction exists between OPEC+ membership and environmental commitments (Página 12, 2025). Similarly, during the World Economic Forum 2025 meeting in Davos, the minister presented a favorable outlook for clean energy investment in the country, highlighting the approval of the Future Fuel Law. According to the Brazilian government, 'this law establishes initiatives to promote decarbonization, sustainable mobility, and energy transition in Brazil. Consequently, investments in the sector amounting to BRL 260 billion are projected until 2037, with the neutralization of 705 million tonnes of CO2 during the same period' (Secretaria de Comunicação Social, 2025). Mariana de Assis Espécie has held a significant role in energy transition diplomacy as the special advisor to the MME minister since 2024. She coordinated the G20 energy transitions working group in 2024 and currently coordinates BRICS energy cooperation activities in 2025. She has stated that the primary point of convergence between the BRICS Energy Group and COP30 is the energy transition, emphasizing Brazil's biofuel production (Agência Gov, 2025). Leveraging her expertise, her discourse is oriented towards the replacement of fossil fuels.

Petrobras also occupies the high-left quadrant as the leading state-controlled joint venture in the Brazilian energy sector, directly linked to the Presidency and the MME. The State holds 50 percent of the company's ordinary shares and, through BNDES, manages a portion of its preference shares and its share capital. In line with the Lula Da Silva government's priorities, in early 2023, the oil company's management established a secretariat for energy transition and sustainability. Concurrently, it has committed $2.35 billion to low-carbon projects. Nevertheless, the company projects an investment of $79 billion in new exploration and production wells by 2029, a significantly bigger figure than previously (Petrobras, 2025). This intensified upstream strategy is driven by the fact that oil surpassed soybeans as Brazil's primary export in 2024, with China being the main buyer, accounting for 40 percent of exports. There are even plans to reopen Petrobras' office in China as a direct diplomatic channel.

Although Petrobras claims that its offshore oil production emits 70% less CO2 equivalent per barrel than the global average, its energy transition-related projects can be largely considered within the spectrum of greenwashing, appearing to be more geared towards expanding market opportunities than a fundamental change of course.

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Vale, a privately owned company, is one of the world's largest producers of iron ore and nickel. It is also active in the extraction of manganese, ferroalloys, copper, gold, silver, and cobalt – minerals crucial for the energy transition due to their essential role in electricity transmission and battery manufacturing. The company also operates hydroelectric power plants in Brazil, Canada, and Indonesia. In addition to representing Brazil in the BRICS Business Council (CEBRICS), Vale participates in the Association for the Development of the Brazilian Mining Industry (ADIMB), a private non-profit organization that promotes scientific-technological cooperation and capacity building in the mining sector, in coordination with institutions such as IPEA, BNDES, and the MME, which is also one of its partners.

In 2024, the MME and BNDES jointly launched the Investment Fund of Critical Minerals (Fundo de Investimento em Minerais Estratégicos), with the participation of Vale. This fund, linked to the new industrial policy, finances domestic and foreign projects for mineral development relevant to energy transition, decarbonization, and soil fertility (BNDES, 2025).

Context set

The lower-left quadrant includes actors with medium-low influence and limited commitment to just energy transition diplomacy, primarily because their focus is mainly local and, to a lesser extent, international. This includes certain initiatives within the Legislative branch, large private companies and banks, public-private partnerships, consultancies, and operational government agencies.

Within the Legislative branch, the Chamber of Deputies has established a Special Commission on Energy Transition and Green Hydrogen Production, presided over by a representative from the Cidadania political party, which aligns with the government. Additionally, the Sustainable Mining Coalition (Frente Parlamentar da Mineração Sustentável - FPMin) has been formed, led by a representative from the Solidariedade political party, also linked to the PT. The coalition's action program comprises six pillars, one of which focuses on energy transition (FPMin, 2025). Regarding the Brazilian Senate, in September 2024, it approved the country's second hydrogen promotion bill, establishing regulations for the Low Carbon Emission Hydrogen Development Programme. This program includes the provision of tax credits for the commercialization of this type of hydrogen within the national territory (Lei Nº 14.990, 2024). In October, it approved the Future Fuel Law, and in December of the same year, it approved the Accelerating Energy Transition Programme (Paten), a project proposed by a representative of the Progressive party, associated with Bolsonarism. This project promotes the expansion of renewable energy production (solar, wind, biomass, biogas, and energy from hydroelectric plants) and renewable fuels (Senado Noticias, 2024).

However, there is no evidence of direct engagement in the aforementioned international forums. In fact, one of the P2P initiatives of the BRICS Forum is the BRICS Parliamentary Forum, which has convened high-ranking parliamentary leaders since 2023. The 11th BRICS Parliamentary Forum will be held in Brasilia from 3 to 5 June 2025. Delegations from 31 legislative bodies and around 150 parliamentarians are expected to attend.

This quadrant also includes agencies that report to the aforementioned ministries and whose functions are primarily operational. These actors include the Agência Nacional do Petróleo, Gás e Biocombustíveis (ANP), which approves offshore exploitation projects; the Agência Nacional de Energia Elétrica (ANEEL), which approves offshore wind projects; the Agência Nacional de Águas (ANA), whose legal mandate is to implement the National Water Resources Management System (SINGREH), created to ensure the sustainable use of rivers and lakes; and the Comité de Monitoramento do setor elétrico (CMSE), among others.

Regarding private actors, the stakeholder survey identified two private companies with significant involvement in energy diplomacy, although their levels of commitment to a just transition are debatable. In the electricity sector, Eletrobras stands out as Brazil's primary electricity generation and transmission company, responsible for 22% of the country's installed capacity, 97% of which originates from low-emission sources (Eletrobras, n.d.a.). In 2022, Eletrobras underwent privatization, reducing the state's share in its voting capital from 68.6% to 40.3%. This company has participated as a commentator in G20 dialogue instances.

Furthermore, several private banks with Brazilian capital have been identified as having a medium-low influence on the energy transition. Among them is Itaú Unibanco, a leading private bank in Latin America. As indicated in the tables, it has participated within the framework of the G20 and the COP. In this context, since 2017, the bank has adhered to the recommendations of the Task Force on Climate-Related Financial Disclosures (TCFD), an initiative established in 2015 by the Financial Stability Board (FSB) to promote widespread market practice in climate disclosure (Itaú, 2024).

Finally, this quadrant also encompasses various business chambers that have assumed a strategic role as intermediaries between the state and the private sector, promoting the renewable energy agenda. These include the Instituto Brasileiro de Mineração (IBRAM), Associação Brasileira de Engenharia Automotiva (AEA), Associação Brasileira de Energia Solar Fotovoltaica (ABSOLAR), Associação Brasileira de Energia Eólica (ABEEólica), and Instituto Brasileiro de Desenvolvimento de Relações Empresariais Internacionais (IBREI). IBRAM and AEA exhibit some reticence towards the energy transition, as their approaches remain

linked to mining expansion and traditional business models in the automotive industry. Conversely, ABSOLAR, ABEEólica, and IBREI demonstrate support for the promotion of renewable energies and cleaner technologies, albeit often driven by the desire to capitalize on the growing market niche.

Final remarks and next steps

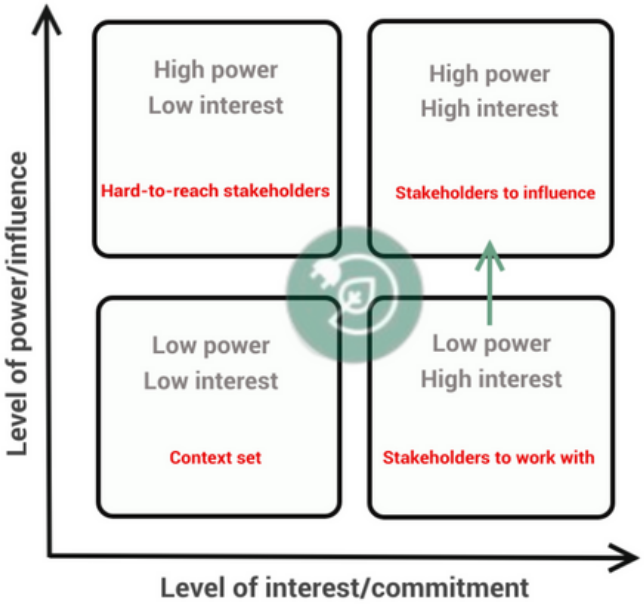
Due to the country's inherent characteristics, Brazil's energy transition narrative is constructed by a multiplicity of actors. Whether driven by a conviction to care for nature or by mere market opportunism, no major resistance to the energy transition is evident. Nevertheless, disagreements arise in *how* it will be carried out.

While the energy transition narrative faces little overt opposition, varied perspectives persist on the *what*, particularly concerning the meaning and implications of a just transition for a developing nation in the Global South endowed with significant conventional resource potential. The current approach to a just energy transition in Brazil involves simultaneously continuing hydrocarbon exploitation and consolidating the renewable energy industry, while also seeking to leverage its important role in the rare metals sector without compromising autonomy or sacrificing communities. Furthermore, the country aspires to project a leadership role with progressive stances in key international forums. This balancing act between local, national, and international considerations has historically characterized the autonomous nature of Brazil's foreign policy. However, it encounters limitations in the face of the climate emergency and the determined positions of a civil society advocating for a substantive, community-based transformation.

In short, while the domestic policy guidance within the latest NDC indicates a transition towards a low-carbon economic model, the actors occupying the top two quadrants wield the greatest influence but hold contradictory positions. The MME, supported by the Presidency, advocates for the deepening of hydrocarbon exploitation within the country. Conversely, the MMA specifically opposes the expansion of the oil frontier into sensitive areas such as the country’s northeastern coast. The MRE has highlighted the ambivalence in the discourse but recently denied any inherent contradictions between these positions.
Furthermore, regarding the multilateral fora targeted by this research, the mapping revealed a greater overlap of actors addressing the topic between the G20 and BRICS, or the G20 and COP, and a lesser degree of overlap between BRICS and COP, with the exception of the MME's actions. Similarly, the MRE's engagement is more closely aligned with climate and environmental issues, and less so with energy.

Several subnational states have also made progress in implementing policies and programs aimed at accelerating the energy transition. However, the presence of transport, agribusiness, and oil lobbies introduces discrepancies in their narratives.

This project is predicated on the aforementioned mapping and analysis of actors involved in the narratives of a just energy transition in Brazil and their projection of leadership in international forums such as the G20, BRICS, and UNFCCC COP30. The aim is to consolidate alliances with key stakeholders for collaboration and to collectively engage those stakeholders we seek to influence. Outreach strategies encompass direct contact through bilateral meetings, shared events, the development of targeted advocacy messages, and the execution of joint campaigns and activities within these forums, among other approaches.



Source: Own work

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