

# Models of Measuring Cooperation: Brazil and Mexico

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**Abstract:** Over the past few decades, South-South cooperation has grown in terms of actors, volume, geographic reach, instruments, and modalities, but, statistics on this type of cooperation have been incomplete and fragmented. The technical, political, and institutional challenges in measuring South-South cooperation are emphasised by countries like Brazil and Mexico, chosen as cases to be analysed in the text. The article explores the experiences in measuring international cooperation provided by Brazil and Mexico, starting with the characterization of the two national trajectories in the quantification and the modalities that determine the process, and analyses the main similarities and differences presented between the cases. The analysis of the countries studied in this article evidence the different institutional designs of international cooperation and the establishment of measurement models elaborated by governments based on their own realities of international cooperation, indicating, therefore, that the process of measuring international cooperation is not only a statistical issue, but above all, a political one. Seen in these terms, South-South cooperation measurement exercises have provided more knowledge about how cooperation activities are organized and their relation to global development agendas, and have also consolidated the transparency of public expenditure.

**Keywords:** cooperation and development; South-South cooperation; public expenditure; Brazil; Mexico; measurement.

## Introduction

The Buenos Aires Outcome Document of the 2nd High-level United Nations Conference on South-South Cooperation, in April 2019, recognizes that developing countries have built their own models of 'planning, monitoring, measuring and evaluating South-South and triangular cooperation' and that there are developing countries interested in establishing a methodology to quantify and evaluate South-South and Triangular cooperation (UN 2019: 6).

Measuring South-South cooperation (SSC) is subject to the construction of their own models by national governments, because one of its main characteristics is that the countries of the South have multiple experiences, agendas, and modalities in the field of

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development cooperation. A central feature for the diversity of experiences, which was not addressed in the final document of Buenos Aires, is the lack of a common definition of South-South cooperation and the lack of consensus on which variables (and how) should be measured.

This issue is of particular interest for developing countries because it implies building capacities to measure, for example, the contributions of the South to achieving the Sustainable Development Goals or providing transparency to public expenditure promoted by different national governments. These experiences provide key insights into how actors understand international cooperation, and from what types of institutional arrangements and approaches countries operationalize SSC.

The lack of a common definition on SSC has been one of the factors that limit data availability and, therefore, knowledge about different SSC strategies. It is worth mentioning, however, that the belief in the need for a single definition comes from the experience of developed countries in international cooperation, especially that conducted within the Organization for Economic Cooperation and Development (OECD) and the trajectory of its Development Assistance Committee.

Thus, the underlying problem of statistical models for measuring development cooperation needs to answer: what is development cooperation? In practical terms, it means understanding what development cooperation is in a given national context, i.e. which activities are development cooperation, and which are not (for example: all contributions to international organizations should be considered development cooperation?) and identify the variables that must be quantified in this process, to form a database for quantification, analysis and dissemination of metrics. It is imperative to recognize, therefore, that the SSC measurement process corresponds to a political strategy and not just a statistical issue (Besharati and Macfeely 2019).

Despite the political, technical, and institutional challenges involved in measuring SSC, Latin America has been the stage for experiences of quantification processes in Brazil (Brasil 2020), Chile (Chile 2019), Colombia (Nívia-Ruiz 2020), Costa Rica (OECD 2019) and Mexico (Mexico 2013). Furthermore, there are other experiences of measuring South-South cooperation, such as within the framework of the African Union (African Union 2017) and the Ibero-American General Secretariat (SEGIB 2010).

In this scenario, it should be noted that the process of measuring international cooperation in Southern countries is a key element for broader changes within the scope of development cooperation. These changes, such as the increase in the volume and geographic reach of SSC, have been driven, in recent decades, by the emergence of actors such as China, India and others (Mawdesley 2012). According to Ayllón (2011), these changes can affect the distribution of power on a global scale and change the configuration of international relations, expanding the traditional agenda of international cooperation. The term 'emerging donors', however, is politically incorrect because many of these countries do not see themselves as such.

What has been observed is a process of redefining the paradigms of dominant institutions (such as the OECD accepting developing countries as members since the 1990s), the creation of new institutions for financing and managing development, such as the

New Development Bank of the BRICS countries and the emergence of a more active voice of developing countries in international politics. In this scenario, the countries of the South have the possibility of going a step further traditional metrics, guided by donor countries of the OECD Development Assistance Committee (Mello and Souza 2014).

SSC has, therefore, evolved to become a key aspect, from financing to development, articulating SSC with the 2030 Agenda and its Sustainable Development Goals, monitoring, and evaluating public policies, the effectiveness of the development cooperation and other issues that require us to think and rethink the multiple experiences of SSC.

This piece attempts to analyse the measurement processes of international cooperation provided by Brazil and Mexico, based on the characterization of the two national experiences of quantification and identification of similarities and differences in the modalities that determine this process, focusing on the political aspects of quantification, or that is, the underlying notion of what is considered international cooperation.

The questions that guide my reflections are: How do Brazil and Mexico quantify SSC? What are the similarities and differences between the cooperation modalities of both countries? What do these countries' data say about their international cooperation? The working hypothesis suggests that Brazil and Mexico collect, analyse, and report SSC data using their own methods, based on the national experience of each of them. Brazil quantifies the SSC offered by the federal government, although the country does not provide financial cooperation, and has reported the data via the report Brazilian Cooperation for International Development (COBRADI). The quantification of Brazilian cooperation highlights the fact that Brazil's main expenditures on cooperation are made through contributions to international organizations, payment of technical hours, per diem and airfares for public servants and collaborators who work in cooperation activities, projects and programmes for Brazil.

In Mexico's case, the Mexican Agency for International Development Cooperation (AMEXCID) has the responsibility, derived from the Law on International Development Cooperation (2011), Article 27, of collecting, analysing, and publishing the quantification of the cooperation offered. Mexico's data survey includes contributions to international organizations, grants, financial cooperation, administrative costs, technical cooperation, and humanitarian aid. Furthermore, Mexico has been a member of the OECD since 1994 but maintains its own guidelines for quantifying cooperation.

Regarding similarities, I identify a concentration of contributions to international organizations: 88.08% in Mexico in 2017, and 85% in Brazil between 2017-2018. Brazil and Mexico focus on their regional environment – Central America for the later and South America for the former – but Brazil also focuses on their Portuguese-speaking counterparts in Africa. It is interesting to note both countries' engagement in bilateral technical cooperation, in sectors such as public administration, agriculture, education, science and technology and health. Another similarity is the institutional design of the bilateral agencies ABC and AMEXCID, both linked to their respective Ministry of Foreign Affairs. The main differences are in the type of expenses carried out by the countries. There are peculiar dynamics, specific processes in Brazil that do not correspond to the OECD cooperation model. Mexico operates within the framework of financial cooperation, so it is

a financial donor, albeit on a smaller scale than the developed countries, but not Brazil. The process of quantifying international cooperation, based on a legal framework, is conducted by AMEXCID itself. In Brazil, there is no legal framework for international cooperation nor its measurement, in such a way that national institutions are not obliged to report data, which affects the systematization of data and the analysis and publication of data, which is not done by the Brazilian Cooperation Agency, but by the Institute for Applied Economic Research (IPEA).

In this sense, the data point to the conceptions about SSC and ways to operationalize it. Data recording indicates that measurement allows a better understanding of how SSC is organized and its relationship with global agendas, in addition to improving the transparency of public funding. For both countries, the survey of international cooperation expenditures enables the government to ensure transparency and accessibility to the monetary amounts arising from the federal public budget.

Furthermore, data show that the value of SSC is the exchange of knowledge, policies, experiences and know-how, and that the monetary values do not represent the true contribution of these countries. It is necessary to discuss in greater depth, in both countries, the logic, coherence and meaning of SSC alignment with global agendas, such as the 2030 Agenda. Thus, the two countries decided to produce data on SSC because the publication of this information mobilizes different interests, from political leadership, bureaucratic interests, and the promotion of each country's cooperation agendas. In this sense, with the distribution of data there is a real improvement in the public debate on SSC in Brazil and Mexico.

This analysis was based on statistics and other official sources made available by the governments of Brazil and Mexico. It bodes well to remember that the two States are on the United Nations Conference on Trade and Development's list of 'developing economies' in the Americas (UNCTAD 2021).

The article is organized in five sections, in addition to the introduction and concluding remarks: the first section goes into the theme of SSC, with a brief conceptual and methodological discussion underlying the analysis; the following section, I examine the historical background and challenges of measuring SSC; then, I analyse the Brazilian experience in quantifying federal government expenditures, which covers the period between 2005-2018; the fourth section presents and describes the Mexican experience in scaling its international development cooperation, between 2011-2017, which also covers resources exclusively from the federal government; and the last section analyses the elements of similarity and difference between both countries.

## **Conceptual and methodological discussion**

This section presents a brief discussion regarding the conceptual and methodological foundations of the research. It is well known that the measurement of SSC is a matter of political order (and not only statistics), which concerns the foreign policy of governments; and that the process of quantifying organizes the meaning of cooperating in the perspective of a certain national experience. Regarding the research design, the

comparative case study is adopted to identify elements of similarity and difference in the measurement processes.

To facilitate this discussion, the article proposes a conceptual understanding of SSC as development cooperation, that is: SSC as an integral part of the broader universe of development cooperation, which, in turn is one of the most outstanding areas, and one of the most fundamental pillars of international politics since 1945. In this sense, linking SSC with development cooperation implies affirming South-South relations as a framework for political, economic, social, cultural, environmental, and technical collaboration between developing countries, which can occur bilaterally, regionally, and in both intra- and inter-regional dimensions. It means that developing countries have shared knowledge, skills, experiences, and resources to achieve their development goals through joint efforts, fundamental to the Southern countries' diplomatic tradition.

The starting point proposed in this article, however, is the understanding of development cooperation as a political field that has been present in international politics since the end of the Second World War. International cooperation was central in legitimizing multilateralism of the United Nations, in the Bretton Woods system and even in the post-Cold War period, in the emergence of Southern countries, which came to play a relevant role in the cooperation agenda. As a political field, development cooperation is permeated by power relations, and actors compete for legitimacy, recognition, and material resources (Milani 2018). This means, therefore, that development cooperation is not a neutral instrument of intervention in the reality of countries but responds to the national interests of state actors in the scope of international politics.

According to Besharati and MacFeely (2019: 5) SSC should be understood as a specialized scope of international cooperation among southern countries, and encompasses all activities, resources, and possibilities for these countries to cooperate with objectives favouring development. When referring to SSC, countries of the South include not only donations and technical cooperation, but also regional economic integration, trade, investment, remittances, humanitarian interventions and peacebuilding, export credit lines and other instruments and modalities of cooperation, breaking with the more restricted definition of Official Development Assistance (ODA), a concept of international cooperation that concerns the experience of developed countries and members of the OECD Development Assistance Committee.

Emma Mawdsley (2012) identifies four characteristics of the symbolic regime of the SSC that differentiate it from OECD cooperation policy: the affirmation of a shared identity among developing countries; the provision of technical knowledge more suited to social and technological development (based on similar experiences); the rejection of hierarchical relationships between donors and recipients; and the relevance of cooperation that produces mutual benefits.

Regarding the method, this research is based on the comparative case study, which according to Bartlett and Vavrus (2017), consists of an in-depth study of objects in order to allow their broad and detailed knowledge, as well as the identification of relationships and dynamics between the compared elements. Within the context of this article's outline, a comparative case study involves the analysis and synthesis of the similarities and

differences of the SSC measurement model provided by Brazil and Mexico, between 2005 and 2018, with Mexico's records considering the years between 2011 and 2017. To this end, the specific characteristics of each measurement process are described in depth in the following sections. The argument for selecting the specific cases is directly linked to the research problems, stated in the introduction.

The similarities and differences are identified from the characterization of the quantification models, and the interpretation of these similarities and differences is key to analyse what the data say about the SSC implemented by Brazil and Mexico. It should be noted that the comparison does not concern the amount spent within the scope of the SSC, but rather the similarities and differences of the cooperation modalities.

It is, therefore, a matter of comparing modalities (identified below) over values, because modalities organize the meaning of SSC. Comparing costs is not feasible because the method of calculating values is different and, ultimately, the understanding of cooperation between both actors is different. By the way, considering only the values for Brazil, it is worth mentioning that these are not comparable over time, because the methodology is updated with each new report.

The comparison, therefore, takes place within the framework of the modalities that make up the records of each country in the data collection to measure SSC, namely: contributions to international organizations; technical cooperation; humanitarian cooperation; military cooperation; cooperation in science & technology; granting of scholarships; domestic support for refugees; concessional credits; loans and/or grants (financial cooperation); connection with the 2030 Agenda; legal framework; treating foreign debt relief as international cooperation; and identification of the source of funds. These elements are compared in Table 1.

Regarding case selection, Brazil and Mexico represent two SSC operators in Latin America that report on the SSC provided. The first is a State whose international cooperation, with an effectively global scope, has precedents in the 1960s and 1970s, and follows an international cooperation strategy linked to its foreign policy. Brazil does not have a specific legal framework (law or decree) to regulate international cooperation, but it records spending on international cooperation since 2010. Mexico, who has been part of the OECD since 1994, and built the cooperation system based on that organization, considers itself an agent of SSC and a recipient of North-South cooperation. Mexico emerged as an agent of international cooperation during the Cold War, and the main destination has been Central America and the Caribbean. A key milestone for Mexico's SSC is the establishment of an International Development Cooperation Law, in 2011, and the transformation of this instrument into the cornerstone of international cooperation policy. Both Brazil and Mexico are emerging Latin American economies with geopolitical ambitions that project beyond their regions and have established particular experiences, discourses, and modalities in the political field of development cooperation.

## Historical antecedents and challenges for measuring South-South cooperation

The SSC literature refers to the Bandung Conference in 1955 as the ideological and political origin of this modality of cooperation in which the principles of solidarity and non-intervention were constituted. Later, began a period of evolution and intensification of political, commercial, financial, and technical alliances between developing countries, including SSC (Ayllón 2014).

From that moment on, SSC became relevant in several international forums, such as in the Non-Aligned Movement in 1961 and the Group of 77 and the United Nations Conference on Trade and Development (UNCTAD) in 1964. Also, in the proposals for establishing a New International Economic Order and the creation of the United Nations Office on South-South Cooperation, both in 1974, the last one established by the General Assembly of the United Nations (UN) with the mandate to defend and coordinate SSC in that international organization. It is worth mentioning the United Nations Conference on Technical Cooperation among Developing Countries, which generated the 1978 Buenos Aires Plan of Action, recognizing Technical Cooperation among Developing Countries as an instrument for promoting development (United Nations 1978: 1).

According to Gosovic (2016), with the end of the Cold War and the beginning of the 21st century, the scenario of international development cooperation was marked by a multipolar reality, in which the countries of the South, with a more active global dynamic, consolidate their experience in SSC. Thusly, SSC has become central to global development agendas, especially in the context of the Millennium Development Goals (MDGs), development finance and the United Nations 2030 Agenda and its Sustainable Development Goals.

Currently, SSC provider countries operate in a scenario defined by multiple modalities, which include financial and non-financial cooperation, technical, humanitarian and science and technology cooperation, the granting of scholarships, export credits and other forms of official financing (Renzio and Seifert 2013).

According to Di Ciommo (2017), other challenges of a political nature involve emerging powers that have no interest in quantifying their SSC, but also technical challenges related to defining and measuring monetizable and non-monetizable elements of SSC (for example, how to measure the cost of disseminating a public policy from one developing country to another that has been implemented in the country of origin for years?), as well as the institutional issues involved in establishing national SSC measurement systems (such as the existence of a legal framework for that specific purpose). There are also reservations about monetizing SSC due to difficulties in quantifying components such as knowledge and experience sharing.

One of the reasons for measuring cooperation is the transparency of public spending and knowing details about the inclusion of a given government in the scope of SSC. Governments implementing SSC can benefit from this data to support the monitoring and evaluation of actions, projects and programmes and promote successful experiences

at the international level. Furthermore, measuring is relevant for the creation of a national policy for international cooperation and for an understanding of what should be considered cooperation.

In addition, to registering, identifying, collecting, and analysing cooperation costs and measuring them, it is necessary to answer the following dilemmas: what should be understood and registered as SSC? What is the nature of the resources spent? What are the main destinations of SSC activities? What are the results? And what about impacts? Should participations in peace keeping missions be quantified as SSC? What about military cooperation? Are expenditures concentrated in the bilateral or multilateral modality and why? Should export credits be considered SSC? Should foreign loans and debt relief be considered as SSC? How to register and quantify the material, physical and human (non-monetizable) dimension of SSC in the scope of the provision of international public goods?

Apart from national governments, some international institutions have included in their mandates the promotion of the debate on the quantification and *accountability* of SSC. So it is possible to identify initiatives within the scope of the United Nations, such as the determination of the Accra Agreement (UNCTAD 2008: 35), so that UNCTAD can 'upgrade data and analytical tools on South-South flows and cooperation.' The Committee on South-South Cooperation of the Economic Commission for Latin America (ECLAC) has experience in designing indicators for SSC quantification (ECLAC 2019).

The non-governmental organization Network of Southern Think Tanks, a global platform with the aim of consolidating knowledge about SSC and creating responses from the South in terms of *accountability* (NeST 2015) has been relevant in debates on the quantification of SSC. In addition, the Ibero-American General Secretariat, which aims at ensuring international cooperation in the SSC modality of Iberian countries, publishes the Report on South-South Cooperation in Ibero-America (SEGIB 2017), on the role of this group of countries (including Brazil and Mexico) under SSC.

Most recently, the 2019 Buenos Aires Plan of Action urged 'all actors to support initiatives for information and data collection, coordination, dissemination and evaluation of South-South cooperation, upon the request of developing countries' (UN 2019: 4). As stated before, currently, national, regional, and international variations in SSC approaches and definitions, as well as the political dimension, make it difficult to reach consensus on statistical concepts and models.

In this scenario, the United Nations Statistical Commission created the Inter-Agency and Expert Group on SDG Indicators (IAEG-SGGs), in 2015, to develop and implement global indicators for the objectives and targets of the 2030 Agenda. In this context, in October 2020, the Working Group on Measurement of Development Support was formed, dedicated to the topic of measuring SSC. It is currently chaired by India and its Secretariat is maintained by UNCTAD. According to a published technical note, the purpose of the sub-group is 'to advise the Working Group on how best to address South-South cooperation in the context of measuring progress against SDG target 17.3' (IAEG-SGGs 2020: 5). This is one of the most contemporary efforts at the United Nations to measure SSC.

From the next section on, this article focuses on mapping two national experiences on measuring cooperation. It is worth remembering that, considering the different levels of coverage, disaggregation of data and temporal landmarks involved, the suggested analysis does not compare values, but describes the experiences and quantification processes of SSC in Brazil and Mexico to identify elements of convergence and divergence, without, however, comparing values and expenditures.

## **The experience of Brazilian International Development Cooperation**

The universalist character of Brazil's foreign policy since the 1990s has intensified the allocation of part of the resources of federal government bodies and institutions in actions, projects and programmes aimed at other countries' development. Until 2010, the international cooperation provided by Brazil was not quantified or systematized by the federal government. The great challenge of public administration in starting the measurement process was (and still is) the fragmented and decentralized nature of the activities implemented under the designation of international cooperation in Brazil (IPEA 2010).

The institution responsible for coordinating international cooperation (provided and received) is the Brazilian Cooperation Agency (ABC), of the Ministry of Foreign Affairs. Created in 1987, ABC has the institutional mission of coordinating and executing international cooperation activities in Brazil, among others, such as planning, implementing, and evaluating. Before starting the aspects of the publications description, it is worth noting that, according to ABC (2013), one of the characteristics of the international cooperation provided by Brazil is the focus shown on the capacity-building (understood as the expansion of knowledge and skills available in the partner country, with the purpose to achieve local autonomy), a factor that frames most of Brazil's international cooperation initiatives as technical cooperation. According to the same report

technical South-South cooperation is understood as the horizontal exchange of knowledge and experience originated in developing countries. The idea is to share learned lessons and best practices available in Brazil, which have been generated and tested to face similar challenges in terms of socio-economic development. (ABC 2013: 13)

In this sense, the international cooperation provided by Brazil is defined by its modalities: bilateral, trilateral, and multilateral. Considering that Brazil's international cooperation is operationalized through isolated activities, work plans, projects and programmes, its quantification takes place from measurement of elements such as: technical cooperation, humanitarian cooperation, contributions to international organizations, educational cooperation, assistance to refugees and asylum seekers, cooperation in science and technology and others. From a legal perspective, SSC initiatives in Brazil must be linked to a Basic Technical Cooperation Agreement, ratified by the National Congress, which makes official the cooperation relations between the Brazilian government and the partner government (ABC 2013).

In 2010, was decided, based in a Presidency of the Republic determination, that federal government should record and measure expenditures on international cooperation. The Ministry of Foreign Affairs (MRE), through the Brazilian Cooperation Agency (ABC), established a partnership with the Institute for Applied Economic Research and its International Studies, Political and Economic Relations Department (DINTE), with the support of Civil House, to organize the first COBRADI, whose objective was ‘to identify, recover and systematize the data and information on public investment for activities, projects and programmes of Brazilian International Development Cooperation in the period 2005-2009’ (IPEA 2010: 12).

Until October 2021, IPEA published five reports on Brazilian international development cooperation, for the following periods: 2005-2009, published in 2010; 2010, published in 2013; 2011-2013, published in 2017, 2014-2016, published in 2018 and 2017-2018, published in 2020. The publication of these reports has varied in methodology over time, including spending on peace keeping operations and military cooperation only in some reports and without a defined temporal frequency.

The following paragraphs, I will present the main characteristics of international cooperation in Brazil, identifying the elements that determine the notion of expenses and some characteristics common to all reports, such as total expenditures, main modalities and destinations of international cooperation. It is worth noting that it was decided to reproduce the amounts spent in dollars. It should be noted, however, that IPEA (2018) did not publish the values in dollars for the years 2014,<sup>1</sup> 2015,<sup>2</sup> and 2016,<sup>3</sup> so the conversion from reais to dollars was calculated using the Central Bank rate.

Chart 1 identifies the evolution of the Brazilian federal government’s expenditures on international cooperation between 2005 and 2018. The second COBRADI report for the year 2010, published in 2013, establishes that the expenses disclosed in the report correspond to amounts settled in

provision of personnel, infrastructure and financial resources for training individuals and strengthening organizations and institutions abroad; organizing or participating in peace keeping missions or operations; management of joint scientific-technological programmes and projects with other countries and research institutes; humanitarian cooperation; support for the integration of refugees in national territory; payment of contributions and payment of participation in international organizations and official donations. (IPEA 2013: 19)

In 2010, the top three destinations for resources were Haiti (47.4%); Chile (16.3%) and Argentina (8.6%). In terms of amounts spent, Brazil spent US\$923m only in 2010 (IPEA 2013). In the period of 2011-2013, a total of 88 national institutions participated in the quantification, with the main destinations being: Mozambique, São Tomé and Príncipe and East Timor (IPEA 2017).

The fourth report (2014-2016) expanded the Brazilian experience in the quantification of expenses and highlighted the ‘technical capacity of researchers who work in the

federal government to conceive their own method and adequate to the characteristics and particularities of Brazilian cooperation' (IPEA 2018: 13). Regarding partner countries, Mozambique was the most important location with a share of 17%, followed by Haiti and Cuba, with 12% and 5%, respectively (IPEA 2018).

The fifth report covers the period of 2017-2018, and introduces concepts such as calculation of technical hours and innovations in the total data collection system. The main destinations were Mozambique, which received 11.5%, Suriname, 8.30% and Haiti, with 5.20% of total Brazilian cooperation resources (IPEA 2020: 16).

Chart 2 identifies expenditures on Brazilian international cooperation by modalities, and shows the prevalence of expenditures with contributions to international organizations and other modalities.<sup>4</sup>

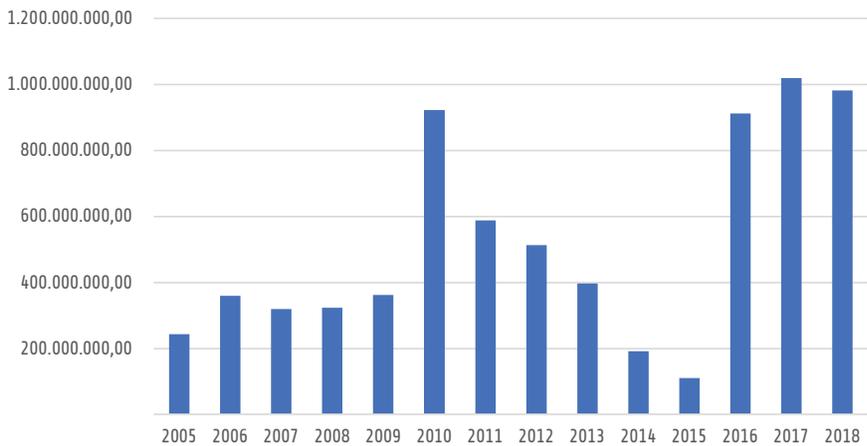


Chart 1. Expenditures on international cooperation by Brazil between 2005 and 2018  
Source: Elaborated by the author based on IPEA (2010); IPEA (2013); IPEA (2017); IPEA (2018); IPEA (2020).

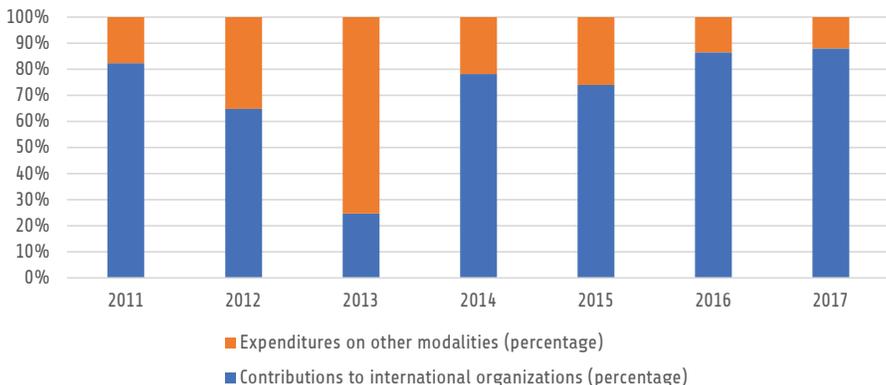


Chart 2. Brazil's expenditures on international cooperation by modalities  
Source: IPEA (2010); IPEA (2013); IPEA (2017); IPEA (2018); IPEA (2020).

One of the main pieces of evidence identified in all five reports is that most of Brazil's expenditures on international cooperation correspond to contributions to international organizations and multilateral banks. This means that most of Brazil's development cooperation expenditures are voluntary contributions to international organizations, and most of these resources are destined to the United Nations system and its agencies, funds, and programmes.

In terms of what COBRADI achieved, a study published in IPEA's Economics and International Policy Bulletin understands that

The report has sought: i) capture the particularities of Brazilian cooperation and examine the international performance of federal government institutions; ii) the dissemination of scientific and technological knowledge; iii) present the historical series and the total allocation of resources for international development; iv) classification of activities in terms of modalities, sectors, destinations; v) the geographical distribution of Brazilian cooperation; and, in particular, vi) the scale of Union expenditures to finance these activities, as well as the description of internationally recognized practices. (Barrios Díaz and Ferreira 2020: 133)

The understanding of expenditures at COBRADI refers to the technical hours of employees or collaborators, the cost of airfares and the amount of daily allowances disbursed, support for events, scholarships, resources destined for refugees in Brazil, contributions to international organizations and others.

Considering the method, COBRADI is a qualitative and quantitative study, and identifies and describes Brazilian cooperation's actions, projects, and programmes, presenting its objectives and characteristics. The methodology for surveying and quantifying expenditures has changed and matured between the publication of the reports. The qualitative dimension, initiated with the second report, implies a description of Brazilian cooperation's 'best practices'. In addition, the report has refined the techniques for quantifying the costs in order to read the total amounts from different variables (e.g. geographical scope, main modalities).

In Brazil's case, the initial procedure of the COBRADI report is the collection of data via request and analysis of ABC records on the technical cooperation initiatives of the federal government institutions; followed by interviews and meetings with the executing institutions, which also collect and provide data via spreadsheets to later start the process of data analysis and the making of the report.

Brazil's international cooperation must still be characterized by the fact that Brazil is not a capital net donor, does not finance the development of other countries, nor does it formulate an international cooperation policy (there is no legal framework or international cooperation law) and spending in development cooperation is not a priority in terms of the federal budget (Barrios Díaz and Ferreira 2020).

In 2020, IPEA published a technical note about the set of changes made within the scope of the measurement model of international cooperation in Brazil to bring the

Brazilian model closer to internationally defined parameters known as the Total Official Support for Sustainable Development (TOSSD) of the OECD, which will be discussed later (IPEA 2020b).

This methodological change is a product of the country's rapprochement to the OECD. Historically, Brazil has been an OECD partner since the 1990s, but in 2017, the South American country made official its interest in joining the Organization as a full member. According to Baumann (2021: 30) 'the decision to formalize this candidacy is associated with the view that belonging to the OECD staff grants member countries a differential in terms of attraction of resources' which can be 'attracted in greater volume and at lower costs.' And, joining the OECD would imply not only the internationalization of data, but the standardization of indicators and methodologies for measuring the evaluation of public policies in general with an impact on what is considered international cooperation.

In practice, TOSSD provides a statistical model for measuring international cooperation (from North and South state actors, international organizations, and private flows) in favour of the 2030 Agenda, and the spreadsheet for data collection. This proposal arises in the context of the Addis Ababa Action Agenda (UN 2015: 32-33), but the concept was defined and discussed within the OECD. It aims is 'to provide a comprehensive picture of global, official and officially-supported resource flows provided to promote sustainable development in developing countries' (OECD 2022: 2).

IPEA (2020b) released a technical note analysing the effects of adopting this model and the relevance of updating the COBRADI report with internationally designed criteria, such as the focus of activities on the SDGs (specifically on the 169 goals). The study presents a comparison between the variables to be collected by COBRADI and TOSSD and evidences that Brazil, based on its experience in measuring development cooperation, can contribute to the international debate from its own experience.

Indeed, adherence to the OECD in general, and the TOSSD model in particular, has been not just a technical issue, but a political one, and concerns the spaces Brazil wants to engage in international politics. However, it is still necessary to discuss what this approximation of Brazil to the OECD means, and its political implications for the field of international cooperation. It should be noted that COBRADI is a dynamic report, and the concepts are not static (the conceptual bases change with each report), but responds to the political needs of a key SSC actor and had been formulated since the political reality of Brazil.

In the context of the TOSSD proposal's emergence and during the period of establishment of the model, it was not at all obvious that Brazil would adopt a quantification model conceived by an international organization. By the end of 2019 and beginning of 2020, the position was that 'the evolution of the study has abandoned preconceived and alien definitions to the Brazilian reality', although the Brazilian survey dialogued with internationally recognized terms, such as modalities, technical cooperation, humanitarian cooperation (Lima and Junior 2020). The debate until then was how to use Brazilian cooperation to measure the contribution of the country to the 2030 Agenda and its Sustainable Development Goals, a key point identified by the 2019 Second High-level United Nations Conference on South-South Cooperation.

This political decision also implies discussing what it means to accept an international statistical model, in the sense of reconfiguring a method that departed from the Brazilian reality for an international standardization. Furthermore, it should also be noted, according to Milani (2018), that the promotion of international cooperation is a foreign policy instrument based on national interest and solidarity, and it constitutes a highly institutionalized agenda of the countries in question.

## **The experience of the Mexican Agency for International Cooperation**

Mexico is a global actor with a long tradition regarding international cooperation, and has been a donor since the 1970s, and development cooperation constitutes an instrument that has driven its foreign policy at the bilateral, regional, and international level. In fact, it is from the 21st century onwards that there is a greater search for institutionalizing development cooperation as a ‘mechanism through which exchanges with the rest of the world are promoted, multiplied, strengthened and facilitated, in order to promote shared economic and social development’ (Pereña 2014: 2).

Mexico’s 2013-2018 National Development Plan proposes that ‘foreign policy will be based on international development cooperation’ (Mexico 2013a: 90) and created expectations of strengthening the country’s international cooperation in institutional and financial terms.

However, the milestone for the institutionalization of development cooperation measurement in Mexico is the creation of Mexican International Development Cooperation Law (LCID), which came into force in April 2011, establishing that

The international development cooperation actions implemented by the Mexican State, both as a donor and as a recipient, must have as their essential objective the promotion of sustainable human development, through actions that contribute to the eradication of poverty, unemployment, inequality, and social exclusion; the permanent raising of educational, technical, scientific and cultural standards; the reduction of asymmetries between developed countries and developing countries; the pursuit of environmental protection and the fight against climate change; as well as the strengthening of public security, based on the principles of solidarity, the defence and promotion of human rights, the strengthening of the Rule of Law, gender equity, the promotion of sustainable development, transparency and accountability, and the criteria for appropriation, alignment, harmonization, results-oriented management, and mutual responsibility. (Mexico 2011: 1)

The legal pillar of the Mexican International Development Cooperation gave rise to the Mexican Agency for International Development Cooperation (AMEXCID) and its Advisory Council (the coordinating arm), the International Development Cooperation

Programme (PROCID), which provides programmatic support for activities. It also includes the National Registry and Information System (Info AMEXCID) and a National Registry of International Development Cooperation (RENCID) as statistical and accountability tools, as well as the National Trust Fund for International Development Cooperation (FONCID), which provides the financial structure. All of these institutions were created as of the 2011 LCID.

Thus, according to Pereña (2014), the Mexican Agency for International Development Cooperation, an agency linked to the Secretariat of Foreign Affairs of the Ministry of Foreign Affairs, is responsible for the National Registry of International Development Cooperation. AMEXCID is, therefore, the managing and coordinating instance of the development cooperation provided by Mexico.

The creation of RENCID is key to the data collection process, carried out through the participation of federal public administration entities that acted in international cooperation activities. The registry brings together the agreements and arrangements that underlie these activities, as well as cooperation projects and actions (in the case of Mexico, these activities are registered both as a donor and as a recipient), partner' reports and expenditure records within the scope of the federal budget and the evaluations of selected activities. It is even a system of accountability of federal public administration (Lallande 2019).

Mexico defines itself as a provider of bilateral, regional, and triangular SSC. From an organizational point of view, the AMEXCID Executive Council stands out as a central coordination mechanism and is made up of '8 State Secretaries, the National Council of Science and Technology and the National Commission for the Development of Indigenous Peoples' and includes articulation with governments institutions, academia, the private sector, and others (Mexico 2011: 3). It is also important to note that LCID (2011: 3) establishes in Article 12 that 'AMEXCID shall develop a methodology to account for human, financial and technical resources intended for international cooperation actions', thus institutionalizing the quantification process of the country, and the responsibility for membership of institutions.

Another central feature of Mexican development cooperation is that the country participates in financial cooperation, which involves subsidy (partial or total donation) of financial resources, at below-market interest rates. According to an official document (México 2012: 1), this cooperation is defined as 'the cooperation offered through the transfer of financial resources in order to support development projects'. Unlike Brazil, Mexico is therefore a net donor of capital.

In this sense, Mexico's financial cooperation focuses on infrastructure projects. The main instrument is the Infrastructure Fund for the Countries of Mesoamerica and the Caribbean, also known as Fondo Yucatán. It is worth noting that between 2012 and 2016, the Fund recorded expenditures in Central American countries: Belize, El Salvador, Honduras, Nicaragua, Costa Rica, and Panama. Also noteworthy is the Humanitarian Aid Fund, which contributes financial resources and sends experts to support assistance and aid tasks.

There are two ‘modalities’ within the Mexican economic-financial cooperation scope: reimbursable and non-reimbursable. The first is a loan, defined as a form of low credit with preferential interest and terms. To quantify, the concessional portion of the loan will be included, and the country adopts the OECD formula to measure the concessionality or donation element. Non-reimbursable cooperation does not include reimbursement of monetary resources granted because it constitutes a full donation (AMEXCID 2017).

Furthermore, it is necessary to point out that Mexico is part of the group of Latin American countries members of the OECD (without, however, appearing in the list of donor countries of the Development Assistance Committee) along with Chile, Colombia and Costa Rica. The country joined in 1994, becoming the 25th member of the Organization and assumed the corresponding responsibilities, accepting its purposes and objectives. Nevertheless, Mexico positions itself as a dual country, insofar as it offers SSC and is a recipient of international cooperation, and still appears on the 2021 list of countries eligible to receive ODA, available on the OECD website (OECD 2023).

Mexico currently makes available six reports with data on the quantification of international cooperation for the following years: 2011-2012; 2013; 2014; 2015; 2016; and 2017. It should be noted that the amount spent on International Development Cooperation by the Mexican federal government is presented in dollars.

Mexico measures the following as development cooperation: technical and scientific cooperation, granting of scholarships to foreigners from developing countries, contributions to international organizations focused on promoting development, financial cooperation, provision of humanitarian aid and the operating expenses of the AMEXCID. Chart 3 identifies the evolution of amounts Mexico spent on international cooperation between 2011 and 2017.

The first report was produced with the participation of 22 Mexican federal public administration institutions. In 2011, the country spent US\$ 268.672.379 and US\$ 77.073.094 in 2012. Just as Brazil, a key trend of the Mexican International development cooperation

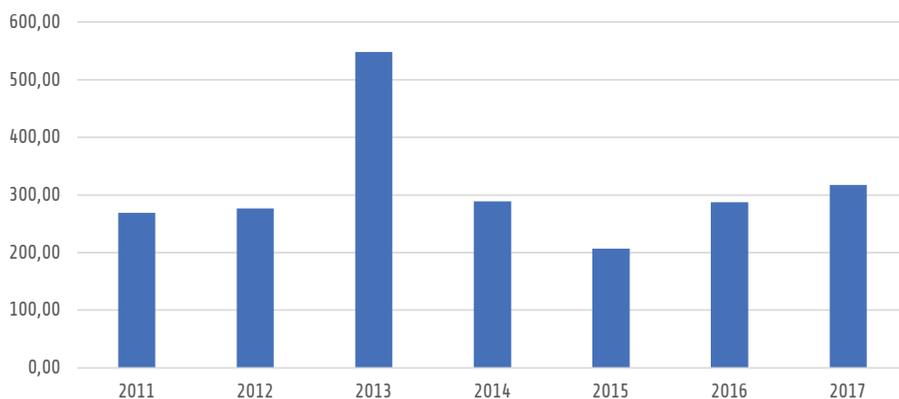


Chart 3. Expenditures on international cooperation by Mexico between 2011 and 2017

Source: Elaborated by the author based on AMEXCID (2012); AMEXCID (2013); AMEXCID (2014); AMEXCID (2015); AMEXCID (2016); AMEXCID (2017).

is the concentration of expenditures on support to international organizations, with 82.4% of the total amount in 2011 and 64.9% in 2012 (Mexico 2012).

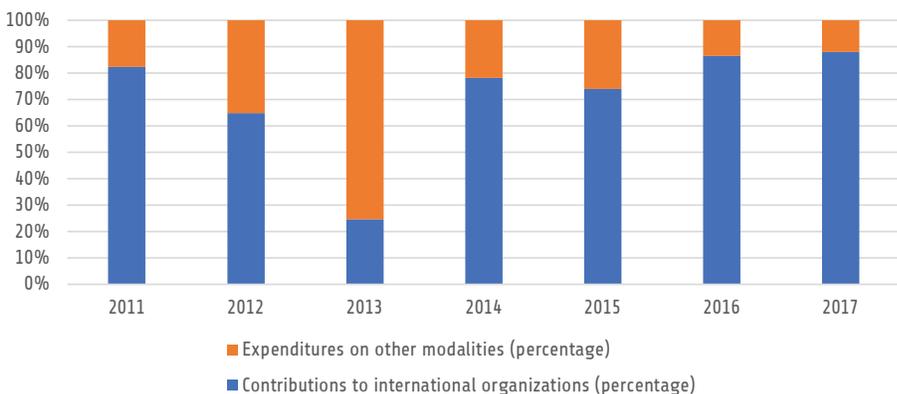
In 2013, the country spent a total of US\$ 547.734.671,19. This year, the Mexican International Development Cooperation expenditures configuration looks different due to the total amount including external debt relief, such as a relief of 70% of Cuba’s debt (BBC 2013). According to official sources (Mexico 2013b), the main expenditures were concentrated on financial cooperation (68.8%); contributions to international bodies (24.6%) and granting of scholarships to foreigners (3.6%).

The 2014 reports (Mexico 2014) register a total of US\$ 288.655.350,52, with contributions to international organizations representing 78.2% of the total, granting of scholarships and financial cooperation corresponding to 7.4% and 5.7%, respectively.

The year 2015 (Mexico 2015) marks a decrease of 28% in the amount spent on international cooperation, calculated in dollars, or 14% if calculated in Mexican pesos. The total amount spent that year was US\$207m. Most of the resources were spent on contributions to international organizations (74.1%), granting of scholarships (11.4%) and financial cooperation (7%).

Mexico recorded a total expenditure of US\$ 287.9m in 2016 (Mexico 2016). Of these, 86.7% correspond to contributions to international organizations, followed by 6.8% for granting scholarships and 2.3% for technical cooperation and AMEXCID’s operational expenditures.

And, to conclude with Mexico’s records, in 2017, a total of US\$ 317.6m is estimated, in which contributions to international organizations represent 88.08%, the granting of scholarships to foreign students 6.79% and technical cooperation 2.48% (Mexico 2017). This is the last year that AMEXCID provides information on the quantification of Mexican cooperation. Chart 4 presents the percentage of expenditures by Mexico in the main modalities of development cooperation.



**Chart 4. Mexico’s expenditures on international cooperation by modalities**

Source: Elaborated by the author based on AMEXCID (2012); AMEXCID (2013); AMEXCID (2014); AMEXCID (2015); AMEXCID (2016); AMEXCID (2017).

Considering only similarities, Brazil and Mexico's contributions to international organizations are the main modalities of public spending on development cooperation, which means that these countries contribute to multilateralism as a foreign policy instrument. The next section delves deeper into the analysis of similarities and differences.

## **Convergence and divergence in the measurement variables of Brazil and Mexico**

This section compares the elements (presented in the section on concepts and method) that determine the measurement of international cooperation and identifies similarities and differences in the Brazilian and Mexican experiences.

The main difference between both contexts is that only Mexico formulates an international cooperation policy with legal framework, including provisions on the quantification process, under the responsibility of AMEXCID (México 2011: 1). Brazil, on the other hand, does not formulate an international cooperation policy and does not have a specific legal framework for international cooperation. In the case of Brazil, the institution coordinating the cooperation (ABC) is not responsible for measuring it (IPEA).

In this sense, it is possible to state that the data collection process in Mexico is more institutionalized than in Brazil, which, without an international cooperation law, depends on the voluntary adherence of national institutions to the COBRADI report. In Mexico's case, RENCID still has a series of Councils that articulate the Mexican development cooperation at various levels. However, even with the international cooperation law, Mexico has not released statistics on its International Development Cooperation since 2017.

The data collection process is similar. Both Brazil and Mexico keep the measurement focus within the federal government. The former does not show an annual pattern in data collection, but reports from the second country have been presented on an annual cycle, even though the survey stopped being conducted in 2017. In the case of the Mexican experience of data collection, it is understood that

In order to concentrate and process the information from the institutions participating in this exercise, an Internet form was enabled that allowed the online registration of data. The information was stored in a database managed by the Agency itself. The request for information was sent from AMEXCID through an official communication addressed to those responsible for the international areas of each institution, who served as the focal point of coordination. The form included an online guide, with instructions for use and a glossary of terms. Likewise, sectorial training meetings were held with those responsible for uploading the information. (AMEXCID 2012: 6)

A particularity in data collection in Brazil is the fact that, recently (IPEA, 2020), Brazil articulated the process of measuring international cooperation with the Sustainable Development Goals. In practice, it means that every international cooperation activity, project or programme must be registered containing information on which SDGs (17) and goals (169) are impacted by the cooperation, so that it makes it possible to read the expenses for each SDG. Mexico does perform this operation.

Both countries have shown convergence in the concentration of expenditures within the scope of contributions to international organizations. This is due to the high volume of regular contributions by each country to international organizations, mainly the UN System and regional organizations and, in the case of Brazil, participation in peace keeping missions.

In both cases, the level of analysis is the same, that is, actions, projects, or international cooperation programmes, based on official cooperation agreements with each partner country. The SSC Brazil and Mexico offer is based on the exchange of public servants and collaborators, who share experiences in the implementation of public policies and capacity-building.

Both countries developed different methods of calculating the technical hours criterion, for example, which is central to the models, because both countries use public staff in the implementation of international cooperation.

Another difference is that Mexico does not measure the number of agreements and projects executed, or even technical hours spent per country, as in COBRADI. In Mexico, participation in an international event (meetings) is not considered cooperation. COBRADI measured this data as cooperation until the fifth report, in 2020, identifying the multiple instances in which Brazil was active in international politics. It is important, however, to differentiate between international activities and international development cooperation activities, to give consistency to what is measured as development cooperation.

Another variable of divergence is that Mexico performs financial cooperation and Brazil has not, because there is no net capital donation or development financing. Mexico still considers foreign debt relief as international cooperation. Other differences identified is that Brazil identifies scholarships granted to developed countries in published reports, evidencing a possible South-North dimension of its actions. Furthermore, military cooperation has already figured in the COBRADI report, while Mexico chooses not to quantify cooperation in military services. It should be noted that Brazil does not consider the internationalization of national companies as development cooperation. The expenses of the National Bank for Economic and Social Development (BNDES) are not considered in the reports.

By and large, the availability of statistics is different insofar as Brazil publishes a dense report with project identification, description of activities, practices, and other details. Mexico does not produce a report, and information is available on the AMEXCID website, making available only the amounts spent by modality.

Finally, Table 1 identifies the elements that drive development cooperation measurement provided by Brazil and Mexico, showing similarities or differences between the modalities offered by each country.

Table 1. International cooperation measurement variables in Brazil and Mexico

Variables	Brazil	Mexico
Contributions to international organizations	Yes	Yes
Technical cooperation	Yes	Yes
Humanitarian cooperation	Yes	Yes
Military cooperation	Yes	No
Science & technology cooperation	Yes	Yes
Granting of scholarships	Yes	Yes
Support to refugees	Yes	No
Concessional loans	No	Yes
Loans and/or grants (financial cooperation)	No	Yes
SDG focus	Yes	Yes
Legal framework	No	Yes
Treatment of external debt relief as international cooperation	No	Yes
Origin of mobilized funds	No	Yes

Source: Elaborated by the author based on official data published by each country.

In essence, the analysis of the countries studied in this article evidenced the different institutional designs of development cooperation and the establishment of measurement models created by governments. These are countries with forty or fifty years of experience in the field of development cooperation, with a rise in the 1990s and 2000s, which are part of the broader process of changes and transformations, of the practice of development cooperation in the 21st century, contributing to make this panorama more complex, with regulations and agendas specific to developing countries.

## Concluding remarks

This article presents the Brazilian and Mexican experience establishing their own statistical models for measuring SSC, by describing both experiences, based on data and official sources, resulting in the identification of the modalities that drives the process of quantifying development cooperation, followed by analysis of similarities and differences between these modalities.

A common trend for both cases is the concentration of expenditures on contributions to international organizations. However, only Mexico can rely on an international

development cooperation law, which institutionalizes the measurement process, making it mandatory to send data to AMEXCID through the National Registry. The Cobradi report's and its description of development cooperation practices bring more data and information than the Mexican survey, presents cases of national institutions and their practices in international cooperation, and highlights the main projects and programmes implemented.

The previous observations show that Brazil and Mexico are States that collect, analyse, and formulate statistical models to analyse data in international cooperation, but in Brazil the challenge to build a legal framework remains.

Finally, it should be noted that the development cooperation measurement processes have provided greater knowledge on how cooperation activities are organized and their relationship with global development agendas; they have also consolidated public expenditure transparency and are key to presenting the multiple processes of knowledge exchange in international partnerships. The exercise of collecting data, requesting records to national institutions, and measuring development cooperation is instrumental for both governments, allowing to highlight the main agendas and activities and contributing in global negotiations for the rearrangement of international development cooperation architecture.

## Notes

- 1 The COBRADI report (IPEA 2018: 16) does not report amounts in dollars. The conversion from real (R\$) to dollar (US\$) was performed using the PTAX exchange rate of the Central Bank of Brazil. The total amount was R\$449.113.379. In 2014 US\$ 1 dollar was equivalent to R\$ 2.34.
- 2 The conversion from real (R\$) to dollar (US\$) was performed using the PTAX exchange rate of the Central Bank of Brazil. The total amount was R\$366.446.637m. In 2015 US\$ 1 dollar was equivalent to R\$ 3.32.
- 3 The conversion from real (R\$) to dollar (US\$) was performed using the PTAX exchange rate of the Central Bank of Brazil. The total amount was R\$ 3.177.057.336b. In 2016 US\$ 1 dollar was equivalent to R\$ 3.48.
- 4 The expenditures on Brazilian cooperation includes technical cooperation (health, education, agriculture), humanitarian assistance, per diems, airfares, and technical hours.

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## Modelos de mensurar cooperação: Brasil e México

**Resumo:** Nas últimas décadas, a cooperação Sul-Sul tem crescido em termos de atores, volume, alcance geográfico, instrumentos e modalidades, mas, contudo, as estatísticas sobre esse tipo de cooperação têm sido incompletas e fragmentadas. Os desafios técnicos, políticos e institucionais de mensuração da cooperação Sul-Sul são evidenciados por países como Brasil e México, escolhidos como casos para serem analisados no texto. O artigo explora as experiências na mensuração da cooperação internacional prestada por Brasil e México, a partir da caracterização das duas trajetórias nacionais na quantificação e identificam-se as modalidades que determinam o processo, analisando as principais semelhanças e diferenças apresentadas entre os casos. A análise dos países estudados neste artigo evidenciou os distintos desenhos institucionais de cooperação internacional e o estabelecimento de modelos de mensuração elaborados pelos governos a partir de suas visões próprias da cooperação internacional, indicando, portanto, que o processo de mensurar cooperação internacional não é apenas uma questão estatística, mas sobretudo política. Nesse sentido, os exercícios de mensuração de cooperação Sul-Sul possibilitam maior conhecimento sobre como se organizam as atividades de cooperação e sua relação com as agendas globais de desenvolvimento e também consolidam a transparência dos gastos públicos.

**Palavras-chave:** Cooperação para o Desenvolvimento; Cooperação Sul-Sul; Gastos Públicos; Brasil; México; Mensuração.

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