

# International Development Cooperation as a Foreign Policy Instrument: The Political Economy of Brazilian Technical Cooperation from 2003 to 2016

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## INTRODUCTION

Over the last century, Brazil has basically been a recipient of international aid. In recent decades, however, the country has established itself as a donor of resources through its international development cooperation (IDC) activities in the context of South-South cooperation (SSC).<sup>1</sup> This change occurred in a moment of significant economic growth rates for the country,<sup>2</sup> which thus gathered the material capabilities to promote IDC to other developing countries.<sup>3</sup> This shift also results from the pursuit for a bigger role in international affairs, which has gained emphasis since the Workers' Party (PT) came to power in 2003 (Milani, Carvalho, 2013). In this period, the country reinforced its insertion strategy by promoting alliances and agreements with partners in the Global South (Oliveira, Onuki, Oliveira, 2006; Pinheiro, Gaio, 2014; Vigevani, Cepaluni, 2007).

During the PT administrations, Brazilian foreign policy decisions were based on an interpretation according to which shifts in the international system resulted in a redistribution of power from the Global North to the South (Milani, 2018). The expansion of the SSC agenda was part of this project to diversify international partnerships, both in the economic and geopolitical fields, to foster its influence in the international system (Leite et al., 2014; Pino, Leite, 2010; Milani, 2018; Quadir, 2013).

Among the sorts of IDC practiced by Brazil,<sup>4</sup> technical cooperation (TC) stands out. Although technical cooperation did not receive the highest budget allocation (IPEA, ABC, 2010, 2013, 2016, 2018), it was Brazil's broadest and most diversified form of international development cooperation<sup>5</sup> (IPEA, ABC, 2016). These activities<sup>6</sup> promoted training and knowledge transfers in Brazil's most successful areas, such as tropical agriculture and public health (Alves, 2013; Grisa, Niederle, 2019).

Brazil did not consider itself a donor, having inscribed its IDC activities under the South-South cooperation (SSC) narrative. The Brazilian government has distanced itself from the concept of foreign aid employed by the Development Assistance Committee of the Organization for Economic Co-operation and Development (DAC/OECD) (Apolinário Júnior, 2016; Milani, Carvalho, 2013). Official discourse<sup>7</sup> claimed that the country did not aim at material gains in providing cooperation, did not impose conditionalities, and followed the principle of non-interference in internal affairs (Mello e Souza, 2012).

The influence of emerging countries<sup>8</sup> on IDC architecture has changed the cooperation landscape (McEwan, Mawdsley, 2012). In the past, IDC was generally understood as official development assistance (ODA), in which three central institutions – the International Monetary Fund (IMF), the World Bank, and the DAC/OECD – regulated the practices of donors and recipients. This architecture is being replaced by a far more complex and diversified scenario, characterized by new actors and approaches (Gore, 2013).

Among these actors, emerging economies such as China, India, and Brazil have gained prominence in this field through their SSC activities (Mawdsley, 2012, 2017; Mawdsley, Savage, Kim, 2014). These countries have significantly increased their IDC flows in volume and number of beneficiaries over the first decade of the 21st century (Besharati, Esteves, 2015; Morvaridi, Hughes, 2018, Gu et al., 2016; Rinaldi, Apolinário Júnior, 2020). At the same time, these countries conserved high poverty levels, stimulating a debate on whether such resources could have a better destination in the domestic environment. Therefore, why would any country, especially a developing one with so many socio-economic problems, provide IDC?

One of the most explored questions in the foreign aid debate is about its purposes. Over the years, several studies have sought to shed light on this topic by analyzing the determinants of its allocation. Two main theoretical models have structured the discussion: the donor-interest model and the recipient-need model (McKinley, Little, 1977). In the former, the amount of foreign aid received by a recipient is expected to be proportional to the donor's level of interest in that country, categorized in terms of economic, political, and security interests. In the latter, the amount of foreign aid is expected to be proportional to the socioeconomic indicators of recipient countries.

While there is a vast literature on the determinants of foreign aid allocation, these studies focus on the aid provided by developed countries.<sup>9</sup> There is a lack of quantitative empirical studies about donors outside the scope of the DAC/OECD, especially regarding the South-South Cooperation provided by developing countries, and in particular, by Brazil.<sup>10</sup> In this sense, this paper contributes to this debate through a case study of Brazil's motivations to provide technical cooperation between 2003 and 2016.

By using these models as a theoretical background, this study analyzes the determinants of Brazilian TC allocation. It evaluates the relationship between TC expenditures by the Brazilian government and economic and political variables related to Brazil's geopolitical interests, besides variables related to recipients' socioeconomic needs. We operationalized economic interests as trade flows, foreign direct investment, and subsidized loans provided by the Brazilian National Development Bank (BNDES) to export goods and services of Brazilian companies.

We operationalized political-diplomatic interests as support in international organizations and forums, such as the United Nations General Assembly (UNGA), the International Monetary Fund (IMF), the World Bank, and the World Trade Organization (WTO); international partnerships such as the Community of Portuguese Speaking Countries (CPLP); and the political orientation of recipient governments. Finally, we considered socioeconomic development, democratic quality, and human rights protection as variables for recipients' needs.

This study's main finding is identifying possible political and economic determinants of the allocation of Brazilian TC. Nevertheless, one can argue that altruistic motivations and the promotion of national interests

do not need to be mutually exclusive. International relations, especially between developing countries, can be seen as a positive-sum game with room for mutual gains (Inoue, Vaz, 2013). The central contribution of this paper is to distinguish particular purposes for the Brazilian TC through a different analytical framework for this case.

This research assumes that we cannot capture all the complexity of SSC by simply analyzing its financial flows. We admit that it is impossible to obtain a complete understanding of Brazilian cooperation by merely quantifying its expenditures (Corrêa, 2017). Nevertheless, we also understand that a more detailed analysis of this resource allocation is critical to understanding the IDC practices established over the years.

This paper is organized in the following way. The first section presents the debate on foreign aid purposes and determinants. The second provides an analysis of the debate around IDC provided by Brazil in recent decades, especially in its technical form. The third describes our research design, hypotheses, variables, and research methods. Section four provides a discussion of the empirical results. Finally, we discuss our findings and present several conclusions.

## FOREIGN AID PURPOSES AND DETERMINANTS

Ethical and humanitarian concerns, political objectives, and economic interests are among the main reasons specialists usually point out to explain the provision of foreign aid (Carothers, De Gramont, 2013; Degnbol-Martinussen, Engberg-Pedersen, 2003; Easterly, 2007; Guljarani, Swiss, 2017; Haan, 2009; Hayter, 1971; Hattori, 2001; Kharas, 2007; Lancaster, 2007; Van der Veen, 2011).

In general, the foreign aid research agenda has analyzed the relationship between idealistic and pragmatic motivations for aid (Guljarani, 2017; Pino, 2006). The international relations literature often presents this dichotomy as realist or neorealist (Morgenthau, 1962; Waltz, 1979) versus idealist explanations of foreign aid flows (Lumsdaine, 1993; Lumsdaine, Schopf, 2007; Stokke, 2013). In a more empirical approach, some studies using econometric methods sought to test these perspectives by analyzing the determinants of North-South Cooperation. One of the seminal works in this field was the study by McKinley and

Little (1977) on the determinants of US foreign aid, which structured the debate around two alternative models for explaining foreign aid allocation: the donor interest model and the recipient-need model.

In the first model, the amount of foreign aid received by any low-income country is expected to be proportional to the donor's level of interest in that country, categorized as economic, political, and security interests. In the second model, the amount of foreign aid provided to each low-income country is expected to be proportional to its socio-economic indicators (Apolinário Júnior, 2016).

Since McKinley and Little (1977), most studies have included variables to capture donors' interests and recipients' needs in their models. One of the most relevant works in this literature is Alesina and Dollar's (2000) study on the allocation pattern of foreign aid of several donors. Their results highlight that foreign aid is guided more by donors' political and strategic interests than by the economic need of recipient countries.

Recipients' needs often include income and, in more recent works, democracy and human rights measures. Donor interest variables broadly refer to geopolitical and economic categories. Economic interests are most often captured by trade and investment flows. Researchers have explored many geopolitical variables, including UN voting patterns, international alliances, arms imports, aid from rival donors, border security threats, colonial donor ties, and common language (Fleck, Kilby, 2010).

Some studies have analyzed the relationship between foreign aid and voting patterns at the UN General Assembly (UNGA) (Dreher, Nunnenkamp, Thiele, 2008), compositions of the UN Security Council (Kuziemko, Werker, 2006), alliances in international financial institutions such as IMF and World Bank (Vreeland, 2011). Others have scrutinized the relationship between foreign aid flows and the ideological-party position of donor countries (Tingley, 2010; Milner, Tingley, 2013) and both donors and recipients (Fleck, Kilby, 2006a).

These studies have generated corroborating evidence for the donor-interest model in general (Maizels, Nissanke, 1984; McGillivray, Oczkowski, 1992; Gang, Lehman, 1990; Alesina, Dollar, 2000; Schraeder, Hook, Taylor, 1998; Berthélemy, 2006; Bermeo, 2008). While there is

systematic evidence about traditional donor aid allocation patterns, empirical evidence is comparatively scarce for donors outside the scope of the DAC/OECD (Dreher, Fuchs, Nunnenkamp, 2013).

The investigation of non-DAC donors has only recently become possible as detailed information on their aid activities has become available (Dreher, Fuchs, Nunnenkamp, 2013; Guljarani, Swiss, 2017). Based on data from the AidData project (Tierney et al., 2011), Dreher, Nunnenkamp and Thiele (2011) analyzed the aid allocation of 16 non-DAC donors during the 2001-2008 period. Dreher and Fuchs (2011) focused on China, Fuchs and Vadlamannati (2013) on India, Kim and Oh (2012) on South Korea, and Fuchs and Klann (2012) on the emergency aid of 83 non-DAC donors.

As for recipients' needs, one may expect emerging donors to direct their cooperation more efficiently than traditional donors, as several of these countries have been aid recipients until recently. Emerging donors could better understand recipients' needs (Dreher, Fuchs, Nunnenkamp, 2013; Dreher, Nunnenkamp, Thiele, 2011; Rhee, 2011). Nevertheless, developing countries have fragile and fragmented bureaucracies regarding their IDC programs (Asmus, Fuchs, Müller, 2017; Besharati 2013; Quadir, 2013), which could hinder the gathering of adequate information for the decision-making process.

The main difference between the aid allocation decisions of DAC and non-DAC donors could be the use of the quality of recipient institutions as a justification. Furthermore, emerging donors could be focusing on poorly governed recipient countries to fill a gap left by traditional donors (Dreher, Fuchs, Nunnenkamp, 2013; Kragelund, 2015).

Traditional donors have often been accused of providing aid primarily to advance their economic and political interests (Dreher, Fuchs, Nunnenkamp, 2013). Several studies suggest that prominent non-DAC donors are not altruistic in their behavior either (Apolinário Júnior, 2016; Dreher, Fuchs, Nunnenkamp, 2013; Dreher, Nunnenkamp, Thiele, 2011; Hardt, Mouron, Apolinário Júnior, 2020; Woods, 2008; Fuchs, Vadlamannati, 2013).

Fuchs and Vadlamannati (2013) suggest that self-interest is an essential motivation for poorer donor countries, given the developmental problems that developing donors continue to face internally. Hence, poor donors would have to emphasize the expected benefits of these activities (Dreher, Fuchs, Nunnenkamp, 2013; Fuchs, Vadlamannati, 2012). Nevertheless, this is controversial, given that decision-making regarding IDC policies in poorer donors may be less transparent and scrutinized by society (Besharati, 2013).

Apolinário Júnior (2014, 2016) analyzes Brazilian aid patterns throughout the first decade of the 2000s based on data from the AidData project. Despite the limitations of the data, results point to political interests in the allocation of Brazilian cooperation. According to these studies, countries that support Brazil in international financial organizations receive more Brazilian cooperation.

Hardt, Mouron, and Apolinário Júnior (2017) also analyze Brazil's technical cooperation allocation flows from 2000 to 2016. They verify the impact of some political determinants on this allocation as support in international financial institutions such as IMF and World Bank and votes at the United Nations General Assembly (UNGA). Nevertheless, the authors did not consider economic determinants in their analysis.

The allocation of aid by “emerging” and “traditional” donors seems to follow similar patterns. Differences observed so far do not justify labeling non-DAC donors as self-interested “rogue donors” in comparison with DAC donors (Dreher, Fuchs, Nunnenkamp, 2013). Therefore, the present study contributes to this debate by exploring whether and which political and economic considerations were significant determinants of Brazilian cooperation between 2003 and 2016.

## THE DEBATE ON BRAZILIAN INTERNATIONAL DEVELOPMENT COOPERATION PURPOSES

During the PT governments, official discourse claimed that IDC provided by Brazil, especially in its technical form, was not guided by commercial interests and only aimed at the demands of receiving countries (Mello e Souza, 2012). The Brazilian Cooperation Agency (ABC) emphasized that its actions must always follow the principle

of horizontality, respect for national development priorities, and the absence of conditionalities (ABC, 2014). In the words of Marco Farani, a diplomat and former ABC director:

Brazil offers other developing countries the experiences and knowledge of specialized national institutions, without the imposition of conditionalities and detached from commercial or for-profit interests, in the areas considered most relevant by the recipient countries themselves. In providing cooperation, Brazil is cautious about acting on the principles of respect for sovereignty and nonintervention in the internal affairs of other nations (Farani, 2009:21).

João Brígido Bezerra Lima, the coordinator of the Brazilian Cooperation for International Development (COBRADI)<sup>11</sup> project at the Institute of Applied Economic Research (IPEA), was questioned by congresspeople in a public hearing at the Chamber of Deputies' Foreign Relations Committee about the reasons why a country with so many internal problems and regional inequalities assists other countries. He replied that it was due to the principle of cooperation among peoples for the progress of humanity stated in the Brazilian Constitution, Article 4, IX (Brasil, 1988).

The work is based on the famous item 9, article 4 of the constitutional text, which determines the cooperation. Why is Brazil doing this? I often go into the constitutional text and mention that we have a determination to cooperate for the progress of humanity, and below, in its sole paragraph, the peoples of Latin America, in a Latin American community of nations. I also go to the United Nations Charter and show it in Chapter I, art. 1, item 3, that we have entered into a cooperative agreement to solve international problems: social, economic, and humanitarian. These are the foundations of Brazilian participation in so many fronts (Câmara dos Deputados, 2012).

We notice that the ideals of horizontality and unconditionality present in the Brazilian IDC were in line with the principles of the Brazilian Foreign Policy, especially non-intervention, autonomy, pacifism, and universalism (Lopes, Valente, 2016). All of them relate to the country's Southern identity (Leite et al., 2014). Historically, continuities have prevailed over ruptures in Brazil's foreign policy, even under different regimes (Cervo, Bueno, 2002; Lima, 2005; Vizontini, 2005; Leite, 2011; Lopes, 2014; Hirst, 1984).



Brazil's self-image in international affairs also shaped the country's involvement in development cooperation. Brazilian policymakers have historically shared a notion according to which the country should play a more relevant role in international affairs (Lima, 2005; Saraiva, 2007; Pecequilo, 2008). Building coalitions with other Southern countries, diversifying partners, and increasing its soft power were seen as instruments to ensure Brazil's leadership in international affairs (Lima, 2005; Valler Filho, 2007; Vigevani, Cepaluni, 2007; Pecequilo, 2008; Puente, 2010; Leite, 2011; Dauvergne, Farias, 2012; Faria, Paradis, 2013; Vigevani, Ramanzini Júnior, 2014; Faria, Nogueira, Lopes, 2012). Hence, cooperation was a vital instrument for Brazil's international engagement (Leite et al., 2014).

Leite et al. (2014) argue that Brazil did not want to be seen only as a developing country. The country sought recognition of its distinctive position vis-à-vis other Southern countries in general. The literature on the country's foreign policy treating Brazil as an emerging, intermediate or middle power reinforce this perception of the country's role as an intermediary between North and South (Lafer, 2001; Lima, 2005; Saraiva, 2007; Sennes, 2012).

Engaging in IDC satisfied these narratives as it enabled the country to build its soft power (Puente, 2010) and reaffirm its identity as a defender of developing countries (Dauvergne, Farias, 2012). Some authors argue that this effort was motivated by new international ambitions, especially after 2003, when the country aimed to expand its presence in global negotiations within the framework of international regimes and multilateral organizations (Abdenur, Fonseca, 2013; Hardt, Mouron, Apolinário Júnior, 2017; Hardt, Mourón, Apolinário Júnior, 2020; Hirst, de Lima, Pinheiro, 2010; Pino, Leite, 2010; Hirst, 2011; Milani, Carvalho, 2013; Apolinário Júnior, 2016). Also, some authors pointed out the instrumental character of these activities in promoting economic interests (Carmody, 2011; Duarte, 2013; Mello e Souza, 2012; Schlesinger, 2012; Stolte, 2012; Figueira, 2019).

The renewal of developmentalism led by the Brazilian state also marked this period (Diniz, 2011; Bresser-Pereira, 2011). Yet, this time with a greater emphasis on social inclusion (Amann, Baer, 2006; Arbix, Martin, 2010; Trubek, Coutinho, Schapiro, 2013). In this sense, social development played a significant role in the Brazilian demands for

development cooperation. In this context, SSC became a central feature of Brazilian foreign policy as a crucial tool for pursuing the country's national interests in the international scenario (Silva, 2015).

Milani and Carvalho (2013) argue that, while the boundaries between technical cooperation, subsidized lending, and market opening for companies are unclear, there is no doubt that Brazil recognized the strategic importance of IDC for its foreign policy. Mello e Souza (2012) suggests that the purposes of development cooperation granted by emerging countries are similar to those of developed countries. Both are diplomatic and economic instruments, not exclusively or primarily aimed at the development of recipient countries. The author suggests that IDC has contributed to the financing of exports of goods and services from Brazilian companies, primarily through the National Development Bank (BNDES).

Duarte (2013) argues that Brazil's official discourse, just like any other, was not devoid of interest. The author suggests that the objectives of the Brazilian state were in line with other societal interests. Several civil society agents, such as the export and agricultural sectors, and Brazilian multinational companies, had specific interests in IDC. Notwithstanding, the author claims that the country's official discourse did not include them, because it could cause mistrust toward Brazil from beneficiary countries just as they have toward Northern donors. He claims that the official narrative only partially reflects the country's IDC objectives. It expressed a desire to create a new development model through more horizontal relationships while concealing those aspects that resemble the approach traditionally adopted by Northern donors.

Some authors argue that Brazil's SSC was not as egalitarian and horizontal as the term cooperation suggests (Bond, 2013; Nogueira, Ollinaho, 2013; Warner, 2015). Despite the official discourse's anti-imperialist tone, the country sought to promote its national capitalism through these initiatives. Some authors argue that the country's SSC could be exporting exploitative structural models to other continents, as these activities primarily benefit large domestic economic groups (Warner, 2015; Alencastro, 2019). Nogueira and Ollinaho's (2013) case study on the ProSAVANA project in Mozambique claims that the project was economically motivated rather than demand-driven, and followed a top-down and an outside-in approach.

Inoue and Vaz (2012) and Milani (2018) argue that altruistic motivations and the promotion of national interests are not mutually exclusive. If we approach international relations from a positive-sum perspective, there is room for cooperation and mutual gains, even in politically asymmetrical relationships. Brazilian IDC was not divorced from subnational, national, and sectoral interests, nor should it be seen as disconnected from the country's wider foreign policy goals. Therefore, to these authors, Brazil pursued political and economic objectives in the provision of SSC, and these actions could positively affect recipient countries.

The role of the Ministry of Foreign Relations (MRE) in Brazil's cooperation system pointed to an interpretation of technical cooperation as a foreign policy instrument (Leite et al., 2014). Nonetheless, there is not much evidence suggesting that ABC coordinated technical cooperation under a single coherent and publicly stated strategy, led by MRE (Leite et al., 2014; Rodrigues, 2008).<sup>12</sup> Diplomats tended to treat economic benefits as unintended consequences of technical cooperation, which contradicts the discourse claiming Brazilian technical cooperation to be devoid of economic interests (Batista, 2012). While diplomatic discourse did not overtly state its economic interests, political interests received a different treatment. Gathering support for Brazil's applications and proposals for reforming global governance was one of the main diplomatic objectives of technical cooperation (Puente, 2010).

Milani (2018) suggests that Brazil's foreign policy between 2003 and 2014 focused on the solidarity<sup>13</sup> aspect of South-South Cooperation and lacked clarity as to the interests involved, which hindered public support. He also points out that, during the transition between Lula and Dilma, scholars and the organized civil society expected the government to implement institutional measures to establish a regulatory framework for cooperation, making it more predictable and transparent – which did not happen. The author argues that this lack of institutionalization and public debate hindered the formation of a consensus in favor of international cooperation within the Brazilian society.

During President Dilma Rousseff's administration (2011-2016), expenses on SSC initiatives decreased (Marcondes, Mawdsley, 2017; Menezes, Fingerhann, 2020). Some authors indicate a decline in Brazilian foreign policy in this period compared to the previous government

(Cervo, Lessa, 2014; Cornetet, 2014; Saraiva, 2014). This process is characterized by a decrease in the number of presidential trips and multilateral strategic partnerships. Also, Brazil lost its leadership among the BRICS and withdrew from debates on several international issues. Nevertheless, the country's involvement in the SSC agenda remained relevant (Suyama, Silva, Waisbich, 2017).

However, one can identify significant changes in the official solidarity rhetoric between Lula and Dilma administrations (Menezes, Fingermaun, 2020; Suyama, Waisbich, Leite, 2016). Rousseff's adjustments indicated a more commercial and less altruistic bias in the reasoning behind SSC (Marcondes, Mawdsley, 2017). In this sense, Rousseff put forth a proposal to reform technical cooperation, establishing more explicit links between SSC and expanding investment and commercial flows. Despite the failure to carry out the reform, it was the first time that the Brazilian government established an explicit link between SSC and commercial and financial interests (Menezes, Fingermaun, 2020).

Michel Temer's administration (2016-2018) saw a significant reduction of resources for SSC (Suyama, Silva, Waisbich, 2017). In addition, budget cuts in critical public institutions, such as ABC and Oswaldo Cruz Foundation (Fiocruz) aggravated the situation of Brazilian SSC (Fingermaun, 2016). More recent analyses seem to agree that Temer administration's guidelines no longer prioritized the role of the Global South in Brazil's foreign policy (Suyama, Silva, Waisbich, 2017).

Casarões (2020) argues that Brazil went through a "status downgrading" process and sought to return to a condition of a middle power during Temer's administration. Thus Brazil changed the substance of its international relations, from big political ambitions to direct trade and investment goals, abandoning its ambitious bids. The institutional crisis established in the country and the discontinuity in the leadership of the Ministry of Foreign Affairs also contributed to reducing the country's engagement in the IDC field.

Furthermore, official discourse became even more explicit about the commercial interests involved in Brazil's cooperation in this period. ABC's website began to emphasize that technical cooperation "has generated visibility for Brazil worldwide, especially among developing

countries, and created opportunities for exporting Brazilian goods and services, generating employment and income in Brazil, among other gains for the country” (ABC, 2021).

More recently, the results of the 2018 elections seem to have aggravated the situation. President Jair Bolsonaro, a far-right politician, constantly attacked the previous government’s foreign policy guidelines, especially those regarding South-South relations (Guimarães, Silva, 2021; Gonçalves, Teixeira, 2020; Saraiva, Silva, 2019; Schutte, Fonseca, Carneiro, 2019). It became common to see the president demonizing cooperative actions towards Southern countries, especially those related to financial cooperation (Globo, 2018). The new government has paid little attention to multilateral cooperation initiatives at global and regional level. Consequently, possibilities for increasing the country’s influence in the field of international cooperation are increasingly distant (Martins da Costa, Milani, 2020). In this new scenario, the future of the country’s role in the IDC field remains uncertain.

## DATA, METHODS AND RESEARCH DESIGN

This study analyzes the pattern of allocation of Brazil’s technical cooperation between 2003 and 2016 based on both donor-interest and recipient-need models proposed by McKinley and Little (1977), and on countries’ main reasons for providing IDC according to the literature on aid purposes – (1) economic interests, (2) political-diplomatic reasons, (3) moral and humanitarian purposes (Degnbol-Martinussen, Engberg-Pedersen, 2003). This paper contributes to the debate on the determinants of cooperation allocation, using both models as a theoretical background. Hypotheses 1 and 2 draw from the donor-interest model. Hypothesis 3 stems from the recipient-need model.

**Hypothesis 1 (H1):** The allocation of Brazil’s technical cooperation follows economic interests. We expect a positive relationship between Brazilian TC and the volume of Brazilian FDI in recipient countries and BNDES-subsidized loans for Brazilian companies in these countries. Also, we expect a positive relationship between Brazilian TC and trade flows with the beneficiary countries.

**Hypothesis 2 (H2):** Political-diplomatic interests guide Brazilian technical cooperation. We expect a positive relationship between TC allocation and the support of recipient countries to Brazil in institutions such as the United Nations General Assembly (UNGA) and the Bretton Woods institutions – World Trade Organization (WTO), the World Bank, and the IMF. We expect CPLP membership to have a positive impact on receiving Brazilian assistance. We also expect a positive relationship between TC and the number of Brazilian presidential visits. Furthermore, we expect leftist governments to receive more Brazilian TC.

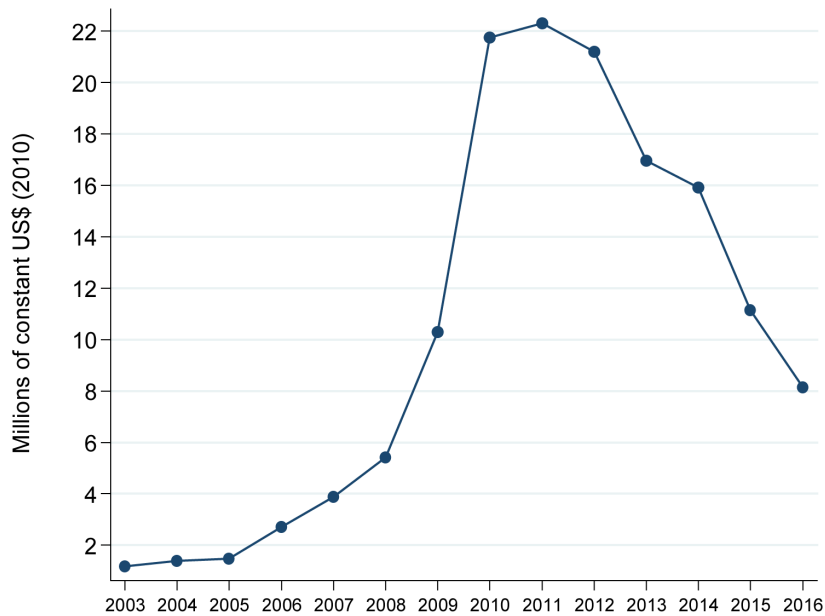
**Hypothesis 3 (H3):** The socio-economic needs and political characteristics of recipient countries dictate the allocation patterns of TC projects. We expect a negative relationship between the volume of Brazilian TC and the development of recipient countries. On the other hand, we expect a positive relationship between TC and receivers' levels of democracy and human rights protection.

In order to test these hypotheses, we used a cross-sectional time-series database containing data from 209 countries from 2003 to 2016, accounting for 2,926 observations, gathering data from different sources. A more detailed description of the variables used in this study is presented below.

The dependent variable corresponds to the Brazilian technical cooperation provided between 2003 and 2016.<sup>14</sup> This variable refers to the total amount of Brazilian TC received by each country in each year of the sample.<sup>15</sup> To create this variable, we added the values of all bilateral technical cooperation projects carried out in a country in a given year and calculated the natural logarithmic values.<sup>16</sup> For projects lasting more than one year, we divided the value for each year regarding the duration of the project.<sup>17</sup>

The graph below illustrates the evolution of the variable “tc” in the last decades based on data provided by the Brazilian Cooperation Agency. Brazil began to provide TC systematically after the Lula administration, especially after 2005. During this period, South-South relations became a priority on the Brazilian foreign policy agenda, with a significant increase in the volume of cooperation provided by Brazil to developing countries (Apolinário Júnior, 2016).

Graph 1  
Evolution of Brazilian  
Technical Cooperation expenditures

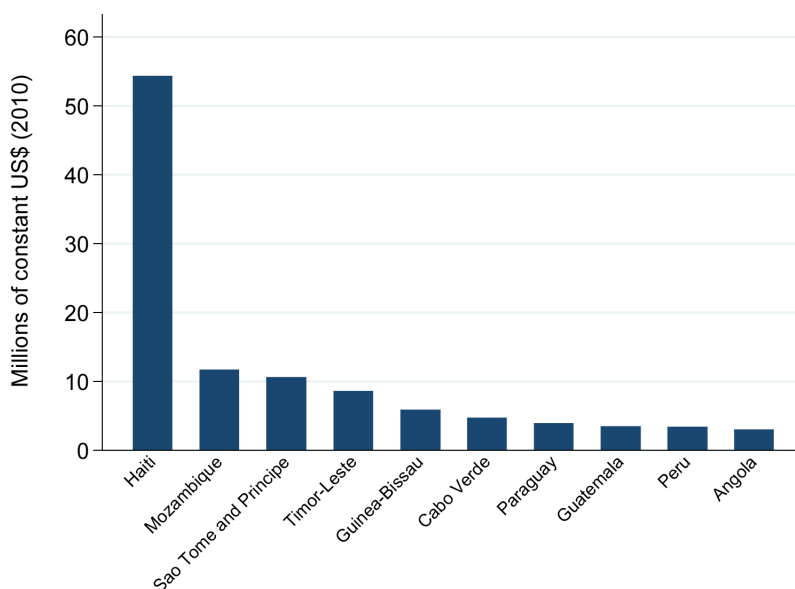


Source: Original graph based on data form ABC (2016).

The country provided significant values in 2010, when Brazil became a global player seeking to gain ground on developed countries. There was a sharp decline since 2011, in part because of the economic slow-down that hit the country more deeply in the following years.<sup>18</sup>

The graphs below show the top recipients of technical cooperation in this period. Graph 2 displays the total expenditures for each recipient. Brazil maintained technical cooperation relations with Latin America, the Caribbean, and Africa, with occasional operations in Asia (East Timor, Afghanistan, and Uzbekistan), the Middle East (Lebanon and Palestinian Territories), and Oceania. The biggest recipients are in general African and American countries, particularly those located in South America and Central America, with Haiti and Mozambique on top.

**Graph 02**  
**Main recipients of Brazilian**  
**Technical Cooperation (2003-2016)**



Source: Original graph based on data from ABC (2016).

To test the first hypothesis, we analyzed variables regarding Brazil's economic interests. We considered trade exports, imports, foreign direct investment, and BNDES-subsidized loans each year for each country of the sample. We obtained data about imports and exports from the COMTRADE database<sup>19</sup> (United Nations Statistics Division, 2018).<sup>20</sup> We retrieved data on Brazilian foreign investment from the Central Bank of Brazil website<sup>21</sup> (Banco Central do Brasil, 2018). We gathered data on BNDES-subsidized loans for the export of services of Brazilian companies from the institution's website<sup>22</sup> (Banco Nacional de Desenvolvimento Econômico e Social, 2018).

To test the second hypothesis, we used variables concerning Brazil's political and diplomatic interests. We used a variable concerning the position of recipient countries with Brazil in the voting sessions of the United Nations General Assembly (UNGA)<sup>23</sup> (Voeten, Strezhnev, Bailey, 2009). We considered two dummy variables related to the position of these countries in relation to Brazil in international financial institutions, such as the IMF and the World Bank, operationalized as partici-



pation in Brazil-led coalitions in the executive boards of both organizations (International Monetary Fund, 2018; World Bank, 2018a).<sup>24</sup> We used a variable regarding the coalitions established within the realm of the World Trade Organization<sup>25</sup> (World Trade Organization, 2018). We used a dummy variable for CPLP membership (Comunidade dos Países de Língua Portuguesa, 2018). We also used a variable regarding the number of Brazilian presidential trips<sup>26</sup> (Ministério das Relações Exteriores, 2011; Presidência da República, 2016). Finally, we used a dummy variable for the countries ruled by leftist governments (Scartascini, Cruz, Keefer, 2018).<sup>27</sup>

To test the third hypothesis, drawn from the recipient-need model, we used variables such as per capita income, democracy quality, and human rights protection quality. We tested whether Brazilian assistance is directed towards the poorest countries and whether Brazil conditions its aid on the level of democracy and human rights protection of recipient countries. We used data from the World Bank’s World Development Indicators for per capita income, obtained directly from the World Bank’s website (World Bank, 2018b). For the democracy-related variable, we used the Polity 2 variable from the Polity IV project (Marshall, Jaggers, Gurr, 2014).<sup>28</sup> For the level of human rights protection, we used a variable obtained from the Political Terror Scale Project database (Gibney et al. 2010).<sup>29</sup>

Table 01  
Descriptive statistics

Variable	N	Mean	Std. Dev.	Min	Max	Time
tc	2926	49134.66	380247.2	0	7906657	2003-2016
ln_tc	2926	2.325977	4.484404	0	15.88322	2003-2016
Bndes	2717	5005759	49090344	0	981675200	2003-2015
ln_bndes	2717	.375958	2.626331	0	20.70477	2003-2015
fdi	2299	90.01491	616.211	0	13420	2006-2016
ln_fdi	2299	.663983	1.82401	-2.480274	9.504501	2006-2016
percapita	2691	13799.01	19618.4	193.8669	144246.4	2003-2016
ln_percapita	2691	8.543446	1.511208	5.267172	11.87928	2003-2016
exp	2926	981675200	2993941760	0	46026153984	2003-2016
ln_exp	2767	17.5311	3.233401	1.609438	24.55247	2003-2016
imp	2926	703541248	2794912000	0	37340606464	2003-2016

**Table 01**  
**Descriptive statistics (cont.)**

Variable	N	Mean	Std. Dev.	Min	Max	Time
ln_imp	2648	15.37576	4.803884	2.079442	24.34335	2003-2016
trips	2926	.1138072	.4055606	0	5	2003-2016
wto	2926	.01063454	.1462971	0	.6666667	2003-2016
unga	2290	.8657351	.1317966	.17105	1	2003-2014
pts	1974	2.618541	1.127853	1	5	2003-2016
cplp	2926	.0382775	.1918982	0	1	2003-2016
imf	2926	.0420369	.2007077	0	1	2003-2016
wb	2926	.0382775	.1918982	0	1	2003-2016
left	2926	.2187286	.4134548	0	1	2003-2016

Source: Original table.

As for research methods, we employed panel data estimation techniques, which offer several advantages over cross-sectional analysis. Panel analysis allows for increased estimation accuracy and control of unobserved heterogeneity (Hsiao, 2003; Cameron, Trivedi, 2005). Given that some of the factors that could explain the allocation of technical cooperation are predetermined or endogenous, and their present values depend on their past values, we used dynamic models. The estimated basic equation can be summarized below.<sup>30</sup> The term  $i$  refers to a specific country in the sample,  $t$  to the year, and  $\alpha$  and  $\varepsilon_{it}$  are the constant and the error term, respectively.  $\delta_1 ct_{it-1}$  is the lagged dependent variable, while the other terms represent the explanatory variables.

$$\begin{aligned}
 ct_{it} = & \alpha + \delta_1 tc_{it-1} + \beta_1 ln\_bndes_{it} + \beta_2 ln\_fdi_{it} + \beta_3 ln\_exp_{it} + \beta_4 ln\_imp_{it} \\
 & + \beta_5 imf_{it} + \beta_6 wb_{it} + \beta_7 wto_{it} + \beta_8 unga_{it} + \beta_9 left_{it} + \beta_{10} cplp_{it} + \beta_{11} trips_{it} \\
 & + \beta_{12} ln\_percapita_{it} + \beta_{13} pts_{it} + \beta_{14} polity_{it} + \varepsilon_{it};
 \end{aligned}$$

$$E(\varepsilon_{it}/X_{is,t}) = 0; \text{ for } \forall t \neq s$$

$$\varepsilon_{it} \sim \text{IID}(0, \sigma^2)$$

Still, some econometric problems may arise from this model: i) the independent variables may be endogenous, correlating with the error term; ii) time-invariant characteristics (fixed effects) may be correlated with the independent variables; iii) the presence of the lagged dependent variable gives rise to autocorrelation; and iv) the panel may have a shorter time dimension and a larger country dimension ( $N > T$ ) (Mileva, 2007). We used the Arellano-Bond family's Generalized Momentary Method (GMM) models to deal with these problems (Holtz-Eakin, Newey, Rosen, 1988; Arellano, Bond, 1991; Arellano, Bover, 1995; Blundell, Bond, 1998).

According to Roodman (2009), Arellano-Bond dynamic estimators apply to six main situations: i) panels with large  $N$  and small  $T$ ; ii) linear relations; iii) when including lagged dependent variables; iv) independent variables not strictly exogenous, which means that they may correlate with past values and possibly with current error values; v) with individual fixed effects, and iv) with heteroscedasticity and autocorrelation within the units.<sup>31</sup>

We also estimated Ordinary Least Squares (OLS) and Panel Corrected Standard Errors (PCSE) models for comparison and robustness. We estimated the models from the simplest to the most complex ones. First, we ran a Pooled Regression Models (POLS), which considers all information as cross-sectional units, ignoring the temporal aspect of the data. Then, we estimated models via Panel Corrected Standard Errors (PCSE), using the option for autocorrelation structure AR1, and assuming the presence of heteroscedasticity (Beck, Katz, 1995). Finally, we utilized the GMM System of Arellano and Bover (1995) and Blundell and Bond (1998). We used robust standard errors and fixed temporal effects in all models<sup>32</sup>.

## EMPIRICAL ANALYSIS

The table below presents the results of the estimates taking the provision of Brazilian technical cooperation as the dependent variable. Models 1, 2, and 3 represent the donor's economic interest model. Models 4, 5, and 6 display the results of the donor's political-diplomatic interest model. Models 7, 8, and 9 show the results of the recipient-need model. Finally, models 10, 11, and 12 present the complete equations with all the variables.

**Table 02**  
**Dynamic panel models for Brazilian technical cooperation allocation**

	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)
	POLS	PCSE	System GMM	POLS	PCSE	System GMM	POLS	PCSE	System GMM	POLS	PCSE	System GMM
Ln_tc	0.805*** (0.0243)	0.612*** (0.0229)	0.670*** (0.0349)	0.742*** (0.0285)	0.462*** (0.0272)	0.671*** (0.0359)	0.812*** (0.0238)	0.665*** (0.0220)	0.636*** (0.0462)	0.733*** (0.0373)	0.575*** (0.0333)	0.429*** (0.0584)
ln_bndes	0.0856*** (0.0177)	0.105** (0.0324)	0.0891*** (0.0231)							0.0598** (0.0209)	0.0723* (0.0345)	0.0799** (0.0258)
ln_fdi	0.00939 (0.0330)	0.0196 (0.0436)	0.0203 (0.0490)							0.0894 (0.0540)	0.117* (0.0593)	0.139 (0.0783)
ln_exp	0.0856*** (0.0215)	0.147*** (0.0360)	0.118*** (0.0320)							0.168** (0.0603)	0.251*** (0.0719)	0.305** (0.0940)
ln_imp	-0.0507** (0.0174)	-0.0742** (0.0258)	-0.0560* (0.0251)							-0.0252 (0.0317)	-0.0395 (0.0436)	-0.0297 (0.0481)
imf				1.767*** (0.472)	3.203*** (0.749)	2.026*** (0.556)				2.048*** (0.545)	2.949* -1.159	3.639*** -1.015
wb				-0.0431 (0.511)	-0.184 (0.913)	0.0518 (0.646)				-0.877 (0.500)	-1.019 -1.302	-1.029 -1.010
wto				1.386* (0.618)	3.257*** (0.794)	1.994** (0.756)				0.615 (0.872)	0.909 (0.995)	1.181 -1.455
unga				2.959*** (0.467)	4.811*** (0.487)	3.445*** (0.624)				4.351** -1.323	5.972*** -1.056	7.539*** -2.056
left				0.278 (0.172)	0.582** (0.209)	0.413 (0.213)				0.226 (0.220)	0.373 (0.250)	0.418 (0.337)

**Table 02**  
**Dynamic panel models for Brazilian technical cooperation allocation (cont.)**

	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)
cplp				1.660**	3.668***	2.185***				1.104	1.913***	2.856*
				(0.530)	(0.446)	(0.604)				(0.612)	(0.551)	-1.207
trips				0.424*	0.363*	0.174				0.00989	-0.00533	-0.0769
				(0.165)	(0.174)	(0.212)				(0.185)	(0.196)	(0.198)
ln_percapita							-0.186***	-0.314***	-0.319***	-0.296**	-0.438***	-0.532**
							(0.0502)	(0.0676)	(0.0910)	(0.113)	(0.128)	(0.184)
pts							-0.00190	-0.0222	0.0287	-0.0353	-0.0695	-0.0141
							(0.0673)	(0.0933)	(0.102)	(0.104)	(0.121)	(0.151)
polity							0.0274**	0.0413**	0.0492**	0.0544**	0.0729**	0.0937**
							(0.00961)	(0.0143)	(0.0164)	(0.0203)	(0.0234)	(0.0341)
_cons	0.0627	-0.417		-2.593***	-4.205***	-2.576***	1.551**	2.776***	2.765**	-3.413*	-4.802**	-6.317*
	(0.332)	(0.482)		(0.412)	(0.431)	(0.517)	(0.557)	(0.766)	-1.000	-1.654	-1.615	-2.581
N	1899	1899	1899	2102	2102	2102	1675	1675	1675	1100	1100	1100
R-sq	0.682	0.428		0.691	0.432		0.688	0.500		0.702	0.562	
AB test AR (1)			-7.21			-7.90			-6.97			-6.37
			0.000			0.000			0.000			0.000
AB test AR (2)			1.41			1.44			1.61			1.54
			0.158			0.151			0.106			0.122

Standard errors in parentheses

\* p&lt;0.05, \*\* p&lt;0.01, \*\*\* p&lt;0.001

The dynamic specification reinforces the intuition according to which the dependent variable's past values are essential in explaining its current values, as the lagged dependent variable coefficients are positive and statistically significant in all models.

Regarding the donor's economic interest, the coefficients for BNDES-subsidized loans, "ln\_bndes", are positive and statistically significant across all estimated models. On the other hand, the Brazilian FDI variable, "ln\_fdi", is not statistically significant in most of the estimated models. The export variable, "ln\_exp", showed positive and statistically significant coefficients in all models regarding the trade variables. The import variable, "ln\_imp", did not show statistical significance in most models, except for the first model, without including the other variables, which presented a negative coefficient.

In substantive terms, these results support the hypothesis which claims a relationship between financial and technical cooperation. Besides, countries that import more Brazilian products also tend to receive more technical cooperation, *ceteris paribus*. Analyzing the magnitude of the indicators for economic interests in the complete model (12), the Blundell-Bond model indicates that every 1% increase in BNDES loans increases the CT received by 0.08%, and a 1% increase in exports results in a 0.30% increase in TC, all other factors held constant.

It is worth highlighting the statistical correlation between technical cooperation, trade, and financial loans. Much has been debated in the Brazilian SSC literature about the relation among these variables in case studies. Many authors, for instance, suggest that the knowledge transferred by the Brazilian Agricultural Research Corporation (EMBRAPA) could help Brazilian exports of agricultural inputs such as fertilizers, chemicals, and machinery, and that cooperation in the biofuels area could disseminate this kind of energy worldwide, helping Brazilian exports (Batista, 2012; Duarte, 2013).

Other studies state that technical cooperation can help the internationalization of Brazilian companies (Duarte, 2013; Mello e Souza, 2012; Milani, Carvalho 2012). By promoting technical cooperation, the Brazilian government can help establish more favorable conditions for national companies to operate on foreign soil. Also, sustainable development in partnering countries can be commercially beneficial to Brazil. Progress in these countries provides the opportunity to build

potential markets for Brazilian firms and products. Africa and Latin America are traditional importers of industrial products from Brazil, so Brazilian businesses are interested in the growth of their economies and the consequential trade flow increase. Financial cooperation activities through BNDES lending consisted in the direct expansion of Brazilian companies into these countries. We found a positive relationship between both variables, showing that both flows occurred simultaneously.

Regarding the donor's political interests, variables related to the support of recipient countries in international organizations "imf" and "unga" have positive and statistically significant coefficients in all models. The CPLP variable, "cplp", has positive and statistically significant coefficients in almost all models, except for model 10. The World Bank variable, "wb", has no statistical significance in any of the estimated models. The presidential trips variable, "trips," was not statistically significant in most estimated models. The variable regarding the political orientation of receiving governments, "left", also did not present statistical significance in any of the analyzed models.

In substantive terms, the results for the "imf" and "unga" variables provide evidence that a country supporting Brazil in particular international institutions receives more Brazilian TC than those that do not, all other things equal – especially in votes at the UN General Assembly and in support of international financial institutions like the IMF. Notwithstanding, the World Bank variable "wb" did not present the same result. A more detailed analysis indicates that the Brazilian IMF bloc incorporated more members in the same period. Major recipients of technical cooperation, such as Cabo Verde, Guyana, Nicaragua, and Timor-Leste, have joined the IMF coalition in this period. Results concerning the "cplp" variable show that Portuguese-speaking countries receive more Brazilian technical cooperation, all other things equal. Coefficients for the "wto" variable indicate no apparent relationship between the coalitions established within that organization and the provision of technical cooperation. Finally, the "left" variable results contradict the hypothesis suggesting that Brazil favored leftist governments with technical cooperation. The data does not indicate any relationship between both variables.

As far as the magnitude of these effects is concerned, the Blundell-Bond complete model (12) indicates that a country belonging to the Brazilian IMF coalition increases the receipt of TC by 363%, belonging to the CPLP increases it by 285%, and every 1% increase in UNGA voting support results in a 7.54% increase in CT, *ceteris paribus*. Substantially, these results underlie the donor's political interest model, as they show that countries that support Brazil on the international scene receive more cooperation, all other things equal.

These results need to be further discussed. The political-diplomatic purposes of Brazilian technical cooperation were more explicit than economic ones during this period (ABC, 2005). There have been many discussions about how Brazil engages in cooperation to gain political capital (Leite et al., 2014). At regional level, a united South America under Brazil's leadership would increase Brazil's political capital to help it engage in the international arena in a strong position. Hence, Brazil demonstrated willingness to align with developing countries in different international forums to act more assertively in the international system.

The way Brazilian SSC prioritizes Portuguese-speaking countries is well-established (IPEA, ABC, 2010, 2013, 2016, 2018). Nevertheless, finding that it also focuses on countries that support Brazil in international organizations, such as IMF and WTO, is noteworthy, especially because Brazil acted vigorously in the last decades, trying to expand its influence in these institutions. We also note that these findings are in line with previous studies (Apolinário Júnior, 2016; Hardt, Mourón, Apolinário Júnior, 2017). Furthermore, the results for the "left" variable are paramount. Certain political groups in Brazil have often claimed that Brazil, especially under PT administrations, has used technical cooperation policies to help left-wing governments in the last years (Messenberg, 2019; Schutte, Fonseca, Carneiro, 2019). This is the first time a study uses statistical analysis to show that this was not necessarily the case.

As for recipients' needs, the democratic quality variable, "polity", showed statistical significance and positive coefficients in all models. The human rights variable, "pts", did not show statistical significance in any of the estimated models. Finally, the development level variable, "ln\_percapita", showed statistical significance with negative coefficients in all models.



Substantially, results for the “polity” variable indicate that countries with better democratic conditions receive more cooperation from Brazil, all other things equal. The variable “ln\_percapita”, also, shows that the least developed countries are prioritized in the allocation of Brazilian technical cooperation. The issue of human rights protection does not seem to influence this allocation. Regarding the magnitude of the effects (model 12), each point gained on the Polity IV democracy scale informs a 9.3% increase in the cooperation received by a country. Finally, a 1% increase in per capita income represents 0.53% less cooperation, all other things equal. We display the marginal effects for models 10, 11, and 12 below.

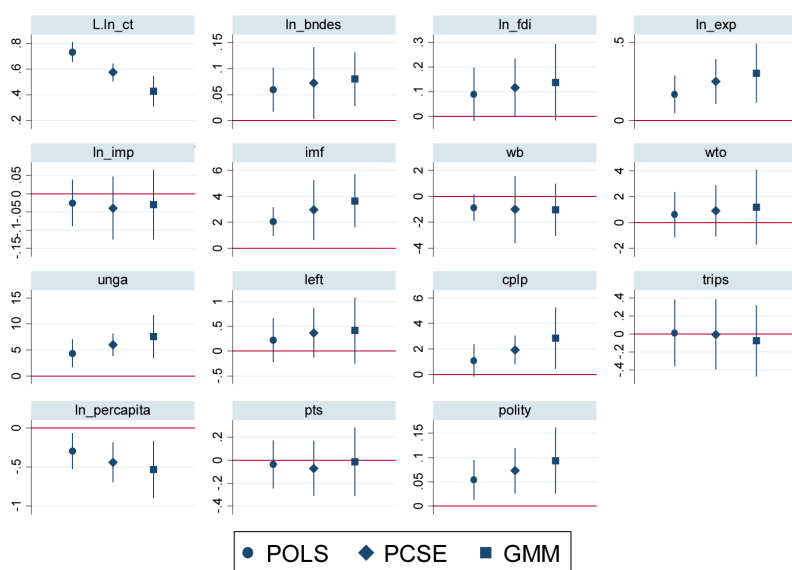
Results for the “moral” variables raise some questions. Literature about Brazilian IDC often suggests that the federal government uses international cooperation to legitimize domestic government policies (Duarte, 2013; Santos, Kraychete, 2016). For instance, the internationalization of domestic programs such as “Fome Zero” (Zero Hunger) and “Bolsa Família” (Family Allowance) demonstrates a direct link between the federal government’s domestic policy and the construction of foreign policy. Thus, targeting poorer countries in cooperation activities goes beyond the mutual interests narrative of SSC, as it could favor the Brazilian government domestically.

Furthermore, one can note that discourse and practices concerning IDC and solidarity also serve the interests of different domestic players, especially civil society organizations such as non-governmental organizations and social movements,<sup>33</sup> who also use foreign policy to legitimize or strengthen their power internally. These players influence foreign policy formulation through informal channels of communication with the Ministry of External Relations and its agencies (Duarte, 2013; Kraychete, Santos, 2016; Milani et al., 2015).

These dynamics could also help explain the positive effects of the “polity” variable. The pro-democracy narrative of Brazilian foreign policy results from the democratization process and aims to renew the country’s diplomatic credentials in the international order after the 1964-1985 exception regime (Braga, Milani, 2019). The foreign policy on human rights is considered strategic for Brazil’s well-known ambitions of international prominence, while also relating to issues concerned with consolidating democracy and national identity.

The urgency of questions of social inclusion and social inequality in Brazil creates challenges both at Brazil's domestic and international agendas. On the one hand, we can see a positive correlation between Brazilian TC flows and the democratic quality of its recipient institutions. On the other hand, there was no significant relationship with human rights protection levels.<sup>34</sup>

**Graph 03**  
**Marginal effects**



Source: Original table.

These results corroborate both the donor-interest model – especially when it comes to political interests – and the recipient-need model – especially socioeconomic needs. These findings seem to confirm the narrative about mutual interests in South-South cooperation during the analyzed period. One of the guidelines for the provision of technical cooperation was precisely “prioritizing [...] programs that favor the intensification of Brazil's relations with its developing partners, especially with the countries of priority interest for Brazilian foreign policy” (ABC, 2005). Furthermore, as mentioned, official discourse began to be more explicit about these motives in the following years (ABC, 2021).

## CONCLUSIONS

The main finding of this study lies in the identification of specific economic and political interests in the allocation of Brazilian TC. They seem to corroborate the broader narrative about mutual interests in South-South cooperation, which assumes the addressing of both donors' interests and recipients' needs. After all, the SSC narrative claims to be a win-win relationship based on reciprocity, including political, economic, and other motivations besides altruism. Proving that Brazilian SSC prioritizes less developed Portuguese-speaking countries is well-established. Notwithstanding, verifying the degree of correlation between technical cooperation and trade, financial flows, and support to Brazil in international institutions, such as the IMF, United Nations General Assembly, is noteworthy. Besides, pointing that the political orientation of recipient countries does not influence allocation decisions – while their democracy levels do – has not been shown by the literature yet.

Nonetheless, arguing that countries have a spectrum of motivations to engage in cooperation is well-established in the literature. The main contribution of this paper to the existing literature is to confirm this assessment by employing a different analytical framework for the Brazilian case, identifying specific purposes for the provision of Brazilian TC during the analyzed period.

We are cautious in specifying the direction of the relationship between these variables. The literature on the determinants of traditional foreign aid infers the causality direction considering the economic, political, and “moral” variables as explaining factors for aid allocation. Our models follow this framework. One could argue that Brazil provides cooperation to less-developed countries which are politically closer to the country in terms of political and “moral” variables. Nevertheless, some recipients could have become closer to Brazil because of cooperation. It is even more challenging to sustain such an argument after considering economic drivers. It appears that trade flows, the expansion of Brazilian companies and cooperation flows were simultaneous. Hence, the task of establishing a direction for the proposed causal relationship between these variables becomes troublesome.

Although Brazil's technical cooperation financial values are not very expressive, they do not contemplate the country's entire IDC effort. The mere quantification of projects does not grasp the immaterial aspects of these activities, especially the transfer and exchange of knowledge, technologies, know-how, and experiences. Notwithstanding, the measurement of these activities presents a portrait, although incomplete, of its dimension.

This work is a first approach to the subject within a broader research agenda that explores it in a more holistic approach. It would be essential to analyze other forms of cooperation practiced by Brazil to verify if the patterns observed are similar among different cooperation categories. We could only gather country-year data expenditures regarding technical cooperation from ABC to conduct the present research. Additionally, it is essential to further explore the political and economic interests involved in Brazilian IDC, especially sub-national and sectoral interests in allocating resources for cooperation projects.

Furthermore, due to the economic and institutional crisis Brazil has been facing since 2015 and the resulting cuts in IDC programs, studies analyzing the policies developed in this field are of paramount importance to shed light on the objectives, results, and interests involved in these activities. After all, forming a pro-cooperation consensus in the Brazilian society will only be possible to the extent that these policies are transparent and well-debated. This research agenda is therefore fundamental to understand the country's role in the IDC field.

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## NOTAS

1. This article draws from the PhD dissertation entitled *The Brazilian Cooperation for International Development as a Foreign Policy Instrument: the Political Economy of Brazilian Technical Cooperation* (Apolinário Júnior, 2019), conducted at the Department of Political Science at the University of São Paulo between 2015 and 2019.
2. Brazil displayed an average annual growth of 4.08% between 2003 and 2010 (World Bank, 2018b).

3. According to the data survey carried out by Le Monde Diplomatique, Brazil provided more than received IDC from countries and multilateral agencies between 2005 and 2009. It is worth noting that Brazil remains a recipient of foreign aid, which is one of the reasons why the country seeks to distance itself from the official IDC terminology used by the Development Assistance Committee (DAC) of the Organization for Economic Co-operation and Development (OECD) (Rossi, 2011).
4. Classifying Brazilian cooperation is not an easy task. The Institute of Applied Economic Research (IPEA), in partnership with the Brazilian Cooperation Agency (ABC), conducted the first official attempt to systematize and classify the Brazilian cooperation through the “Brazilian Cooperation for International Development (COBRADI)” project. The reports classified the Brazilian cooperation in i) technical cooperation; ii) educational cooperation; iii) scientific and technological cooperation; iv) humanitarian cooperation; v) protecting and supporting refugees; vi) peacekeeping operations and vii) expenditures with international organizations (IPEA, ABC, 2010, 2013, 2016, 2018).
5. According to the former director of the Brazilian Cooperation Agency (ABC), Marco Farani, technical cooperation is Brazil’s most important form of cooperation. It transfers knowledge and tools that will be instrumental for the development of these countries. At the same time, it projects Brazil [internationally] (Rossi, 2011).
6. The Brazilian Cooperation Agency defines “Technical Cooperation” as: “a temporary intervention, aimed at promoting qualitative and/or structural changes in a given socio-economic context, in order to remedy or minimize specific problems identified in that scope, as well as to explore opportunities and new development paradigms” (ABC, 2014: 5).
7. See Silva, Ribeiro, and Carvalho (2015) about using content analysis of official pronouncements as an interpretative methodology of Brazilian foreign policy.
8. “Emerging donors” is the most often used term describing state actors that provide aid and development funding outside the DAC/OECD scope. Most of them perceive themselves not as “donors”, but as equal partners pursuing a common goal. Nonetheless, we use the term here to describe state actors providing IDC to developing countries that do not follow the prescriptions of DAC/OECD (Dreher, Fuchs, Nunnenkamp, 2013).
9. This literature is vast. This paper dialogues more directly with the following works based on the donor-interest and recipient-need models: Alesina and Dollar (2000); Bearce and Tirone (2010); Berthélemy (2006); Dreher, Nunnenkamp, and Thiele (2008); Dreher and Fuchs (2011); Fleck and Kilby (2010, 2006b); Kaja and Werker (2010); Kuziemko and Werker (2006); Vreeland (2011); McKinley and Little (1977); Tingley (2010); Milner and Tingley (2013); Maizels and Nissanke (1984); McGillivray and Oczkowski (1992); Gang and Lehman (1990); Schraeder, Hook, and Taylor (1998); Bermeo (2008).
10. Some studies sought to survey or present the existing data about the Brazilian performance in this field (Lopes and Costa, 2018; Lima, Campos, Neves, 2014; Leite et al., 2014; Magalhães, 2013). However, there are still few studies that sought to perform statistical inference from the data collected (Apolinário Júnior, 2014; 2016; Hardt, Mouron, Apolinário Júnior, 2017; Dreher, Nunnenkamp, Thiele, 2011), and none of these works analyzed economic and political interests combined.

11. COBRADI is a project conducted by the Institute of Applied Economic Research (IPEA) in partnership with ABC that raised data on Brazilian cooperation through consultation with the several institutions involved in international cooperation.
12. There has been a strong process of horizontalization and politicization of Brazil's foreign policy in the last decades (Cason, Power, 2009; França, Sanchez, 2009; Milani, Pinheiro, 2013; Silva, Spécie, Vitale, 2010). Ministries, subnational governments, civil society organizations, think tanks, Congress, and private actors increasingly engage with Brazil's cooperation activities (Leite et al., 2014). The main source of this dispersion is the lack of specific legislation in Brazil that clearly defines the objectives, scope, mechanisms, competences, and development cooperation processes (Inoue, Vaz, 2012). The primary instruments are the bilateral agreements, which encompass different types of cooperation (technical, scientific, cultural, economic, and so on). Instead of being the central place for decision-making related to the allocation of technical cooperation, the Ministry of Foreign Relations appears to be more of a veto agency and a facilitation agency for decisions taken outside the Ministry (Leite et al., 2014).
13. Hardt, Mourón and Apolinário Júnior (2020) highlight that the solidarity principle was emphasized by President Lula in his inaugural speech when he underlined the primary directives of his foreign policy, defending the "democratization of international relations without the hegemony of any kind" and a diplomacy guided by a "humanistic perspective" (Silva, 2003).
14. We obtained the data for this study from the Brazilian Cooperation Agency (ABC) after request to the ABC Directorate. The ABC's General Planning and Communication Coordination provided it to us via email in September 2016.
15. Using the projects as the observation unit, the spreadsheet provided information regarding the project's code, title, start year, end year, situation (completed or in progress), recipient country, partner country, and expense values (budget, payment, and balance). As this study aims to capture the determinants for receiving technical cooperation, we considered only the values referring to technical cooperation projects that included a single country in the "recipient" column. We also did not consider projects that had a trilateral label in parentheses beside the recipient's name. In some cases, the column "partner country" contained more than one country in addition to Brazil. We decided to keep these projects in the sample because the reported expenses relate only to Brazil – as long as there was only one receiving country. Besides, we used data referring only to the amounts disbursed in the projects. That is, we considered only the data related to the "payment" column of the spreadsheet. Although this option reduced the values used in the research, it has increased its rigor and conceptual precision. In the end, the sample considered 1,999 projects out of a total of 2,576 and R\$ 142 million out of R\$ 218.88 million.
16. Foreign aid studies often use logarithmic variables to minimize the influence of outliers, improve the stability of results in specifications and samples, and simplify interpretation. It is a common practice in the area to add a minimum value in observations equal to zero to enable the calculation (Fleck, Kilby, 2010).
17. To control for artificial monetary variations, the values for this variable were deflated based on the United States Consumer Price Index (CPI-Index) (Bureau of Labor Statistics, 2018).

18. The higher values in 2010 also resulted from the earthquake that hit Haiti in January 2010 and the efforts to rebuild the country through MINUSTAH (IPEA, ABC, 2018).
19. Both variables are in constant dollars for the year 2010.
20. We used both variables on a logarithmic scale.
21. As the data are only available in nominal values, these values were deflated based on the consumer price index in the United States (CPI-Index) for the year 2010.
22. Again, we used the variable on a logarithmic scale.
23. We used the vote similarity index (0-1). It is equal to the total number of votes, in which two states agree divided by the total number of joint votes. It encompasses three categories (1: yes or approval on a subject, 2: abstention, 3: no or disapproval on a subject).
24. The Executive Board is the most critical organ of both institutions. Of the twenty-four seats on the Executive Directory, only eight are occupied by countries with sufficient votes to nominate their representatives directly. The other countries occupy the remaining seats through constituencies composed of several nations but led by one. These countries form alliances to elect a representative to act on behalf of the group.
25. We calculated it as the participation ratio in each joint coalition with Brazil by the total number of coalitions with Brazilian participation. During this period, Brazil participated in five thematic coalitions: NAMA-11, Mercosur, W-52, FANs, G20T, and the Cairns group.
26. We summed all bilateral presidential trips made to a country in a given year. Visits without any record of meeting with local authorities are considered multilateral. When there are bilateral and multilateral commitments at the same time, the visit is considered bilateral.
27. The Database of Political Institutions (DPI) classifies countries in "1" for "right," "2" for "center," "3" for "left," and "0" for all cases that do not fall into these categories. We created a dichotomous variable indicating whether a left-wing is governing the country in a given year.
28. It is a scale ranging from -10 (more autocratic) to + 10 (more democratic). It calculates the state's level of democracy by assessing the competitiveness of elections, the nature of political participation in general, and the extent of controls over the executive authority.
29. PTS measures the levels of political violence that a country experiences in a given year based on a "scale of terror" ranging from 1 (greater protection of human rights) to 5 (less protection of human rights).
30. There is no consensus in the literature about the appropriate econometric specification for estimating the determinants for foreign aid allocation regarding the specific estimation method. Therefore, we used the most common practices in the literature, focusing on the most recent econometric approaches.
31. This approach controls for endogeneity by including the lagged levels of independent variables as instruments. According to Arellano and Bond (1991), the necessary instruments are internal. The instruments may be based on the lagged values of the instrumented variable. The method transforms all variables, usually by first differences, and estimates the specifications by the generalized moments method (GMM). By instrumentalizing the lag of dependent and independent variables, the method attenuates the

issue of temporal precedence of phenomena and the problem of unobservable omitted variables (Roodman, 2009).

32. The complete models restrict the sample for 2006-2014, given the time covered by some variables.
33. For example, Santos and Kraychete (2016) account for 16 NGOs operating only in Mozambique during 2001 and 2015.
34. Further qualitative inquiry is needed to investigate these relationships, although they are beyond the scope of this paper.



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## RESUMO

*A Cooperação Brasileira para o Desenvolvimento Internacional como Instrumento de Política Externa: a Economia Política da Cooperação Técnica Brasileira entre 2003 e 2016*

Por que um país forneceria Cooperação Internacional para o Desenvolvimento (CID)? A literatura de ajuda identifica propósitos morais e humanitários, objetivos político-diplomáticos e interesses econômicos como os principais motivos pelos quais um país teria uma política de CID. Este artigo contribui para esse debate por meio de um estudo de caso sobre as motivações do Brasil em fornecer cooperação técnica entre 2003 e 2016. Sobretudo durante o governo de Luís Inácio Lula da Silva, o discurso oficial do Brasil enfatizou as características de solidariedade da cooperação nacional. Podemos vincular esse tom de não indiferença aos princípios morais e humanitários para o fornecimento CID. No entanto, a narrativa dos benefícios mútuos da Cooperação Sul-Sul (CSS) indica interesses políticos e econômicos em sua execução. Este artigo analisa os padrões de alocação da Cooperação Técnica (CT) brasileira entre 2003 e 2016. O estudo explora se (e quais) considerações políticas e econômicas foram determinantes importantes da cooperação brasileira. Por um lado, exportações comerciais, empréstimos subsidiados e apoio político em instituições internacionais ajudam a explicar o padrão de alocação da Cooperação Técnica brasileira nesse período. Por outro lado, o Brasil priorizou países menos desenvolvidos com melhores instituições democráticas em sua política de CT.

**Palavras-chave:** cooperação internacional para o desenvolvimento; cooperação sul-sul; ajuda externa; cooperação técnica; política externa brasileira

## ABSTRACT

*The Brazilian Cooperation for International Development as a Foreign Policy Instrument: the Political Economy of Brazilian Technical Cooperation between 2003 and 2016*

Why would a country provide International Development Cooperation (IDC)? The aid literature identifies moral and humanitarian purposes, political-diplomatic objectives, and economic interests as the main reasons a country would have an IDC policy. This paper contributes to this debate through a case study of Brazil's motivation to provide technical cooperation between 2003 and 2016, employing an innovative analytical framework for this case. Especially during Luis Inácio Lula da Silva's government, Brazil's official discourse emphasized its national cooperation's solidarity characteristics. One may link this non-indifference tone to the moral and humanitarian principles of providing IDC. Notwithstanding, the South-South Cooperation (SSC) mutual benefits narrative indicates political and economic interests in its execution. This paper analyzes the Brazilian Technical

Cooperation (TC) allocation patterns between 2003 and 2016. It explores whether (and which) political and economic considerations were significant determinants of Brazilian cooperation. On the one hand, trade exports, subsidized loans, and political support in international institutions help explain the Brazilian Technical Cooperation allocation pattern during this period. On the other, Brazil prioritized less-developed countries with better democratic institutions in its TC policy.

**Keywords:** International Development Cooperation; South-South Cooperation; Foreign Aid; Technical Cooperation; Brazilian Foreign Policy

## RÉSUMÉ

*La Coopération Internationale pour le Développement comme Instrument de Politique Étrangère: l'Économie Politique de la Coopération Technique Brésilienne de 2003 à 2016*

Pourquoi un pays fournirait-il une coopération internationale pour le développement (CID) ? La littérature sur l'aide identifie les buts moraux et humanitaires, les objectifs politico-diplomatiques et les intérêts économiques comme les principales raisons pour lesquelles un pays aurait une politique de CID. Cet article contribue à ce débat à travers une étude de cas sur les motivations du Brésil à fournir une coopération technique entre 2003 et 2016. Surtout sous le gouvernement de Luís Inácio Lula da Silva, le discours officiel du Brésil a souligné les caractéristiques de solidarité de la coopération nationale. Nous pouvons lier ce ton de non-indifférence aux principes moraux et humanitaires de la prestation du CID. Cependant, le récit des avantages mutuels de la coopération Sud-Sud (CSS) indique des intérêts politiques et économiques dans son exécution. Cet article analyse les modèles d'allocation de la coopération technique brésilienne (TC) entre 2003 et 2016. L'étude examine si (et lesquelles) les considérations politiques et économiques ont été des déterminants importants de la coopération brésilienne. D'une part, les exportations commerciales, les prêts subventionnés et le soutien politique des institutions internationales contribuent à expliquer le schéma d'allocation de la coopération technique brésilienne au cours de cette période. D'autre part, le Brésil a donné la priorité aux pays moins développés dotés de meilleures institutions démocratiques dans sa politique de CT.

**MOTS-CLÉS:** coopération internationale pour le développement; coopération sud-sud; aide extérieure ; coopération technique; politique étrangère brésilienne

## RESUMEN

*La Cooperación Internacional al Desarrollo como Instrumento de Política Exterior: la Economía Política de la Cooperación Técnica Brasileña de 2003 a 2016*

¿Por qué un país va a ofrecer cooperación internacional al desarrollo (CID)? La literatura sobre la ayuda identifica los fines morales y humanitarios, los objetivos político-diplomáticos y los intereses económicos como las principales razones por las que un país tendría una política de DIC. Este artículo contribuye a este debate a través de un estudio de caso sobre las motivaciones de Brasil para proporcionar cooperación técnica entre 2003 y 2016. Especialmente durante el gobierno de Luis Inácio Lula da Silva, el discurso oficial de Brasil enfatizó las características solidarias de la cooperación nacional. Podemos relacionar este tono de no indiferencia con los principios morales y humanitarios para la provisión de CDI. Sin embargo, la narrativa de los beneficios mutuos de la Cooperación Sur-Sur (CSS) indica intereses políticos y económicos en su ejecución. Este artículo analiza los patrones de asignación de la Cooperación Técnica (CT) brasileña entre 2003 y 2016. El estudio explora si (y cuáles) consideraciones políticas y económicas fueron determinantes para la cooperación brasileña. Por un lado, las exportaciones comerciales, los préstamos subvencionados y el apoyo político en las instituciones internacionales ayudan a explicar el patrón de asignación de la Cooperación Técnica brasileña en este período. Por otro lado, Brasil dio prioridad a los países menos desarrollados y con mejores instituciones democráticas en su política de CT.

**Palabras-clave:** cooperación internacional al desarrollo; cooperación sur-sur; ayuda externa; cooperación técnica; la política exterior brasileña