

# Evaluating **South-South cooperation** in six **Latin American** **and Caribbean** countries

Shared challenges for implementation of the  
**2030 Agenda for Sustainable Development**

Enrique Oviedo  
Coordinator



UNITED NATIONS

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## Contents

|   |    |
|---|----|
| Foreword .....  | 7  |
| Introduction .....  | 11 |
| Chapter I   |    |
| Experience with South-South cooperation: the case of Barbados .....   | 23 |
| Introduction .....  | 23 |
| A. Definitions of South-South cooperation and triangular cooperation used in Barbados, which shape the understanding of the process and related policy formulation .....                                      | 32 |
| B. Historical antecedents to contemporary South-South cooperation in Barbados .....   | 33 |
| C. The management and oversight of South-South cooperation in Barbados: institutional arrangements for the initiation, implementation, management, monitoring and evaluation of South-South cooperation ..... | 35 |
| D. Reporting of South-South cooperation and triangular cooperation .....  | 36 |
| E. Main advances, challenges and lessons learned in Barbados .....  | 43 |
| 1. Advances .....   | 43 |
| 2. Challenges .....   | 43 |
| 3. Lessons learned .....  | 44 |
| Bibliography .....  | 46 |
| Annex I.A1 .....  | 54 |
| Chapter II  |    |
| Experience with South-South cooperation: the case of Colombia .....   | 55 |
| Introduction .....  | 55 |
| A. Institutional framework for South-South cooperation in Colombia .....  | 61 |
| B. Assessment methodology and implementation .....  | 66 |
| C. Colombian South-South cooperation in figures .....   | 70 |

|   |     |
|---|-----|
| D. Lessons learned .....  | 76  |
| Bibliography .....  | 79  |
| Annex II.A1.....  | 82  |
| <b>Chapter III</b>  |     |
| Experience with South-South cooperation: the case of Cuba .....   | 83  |
| Introduction.....   | 83  |
| A. Normative and institutional framework for Cuban<br>South-South cooperation.....  | 84  |
| B. The Cuban experience with South-South cooperation .....  | 90  |
| 1. Regional and multilateral participation .....  | 96  |
| 2. Cuban humanitarian aid following natural disasters .....   | 99  |
| C. Conclusions and lessons learned .....  | 101 |
| D. Recommendations.....   | 102 |
| Bibliography .....  | 102 |
| Annex III.A1 .....  | 105 |
| Annex III.A2 .....  | 106 |
| Annex III.A3 .....  | 107 |
| Annex III.A4 .....  | 108 |
| <b>Chapter IV</b>   |     |
| South-South cooperation: the case of Jamaica .....  | 109 |
| Introduction.....   | 109 |
| A. Definitions of South-South cooperation and triangular<br>cooperation used in Jamaica, which shape the understanding<br>of the process and related policy elaboration.....  | 115 |
| B. Historical antecedents to contemporary South-South<br>cooperation in Jamaica .....   | 117 |
| C. The management and oversight of South-South cooperation<br>in Jamaica: institutional arrangements for the initiation,<br>implementation, management, monitoring and evaluation<br>of South-South cooperation ..... | 119 |
| D. Reporting of South-South cooperation and triangular<br>cooperation in Jamaica .....  | 121 |
| E. Main advances, challenges and lessons learned.....   | 127 |
| 1. Advances.....  | 127 |
| 2. Challenges.....  | 128 |
| 3. Lessons learned.....   | 130 |
| Bibliography .....  | 131 |
| Annex IV.A1.....  | 138 |
| <b>Chapter V</b>  |     |
| Evaluating South-South cooperation: the case of Paraguay .....  | 139 |
| Introduction.....   | 139 |
| A. South-South cooperation in Paraguay: an institutional<br>framework working to strengthen itself .....  | 141 |

|  |     |
|--|-----|
| B. Paraguay's cooperation offerings .....  | 143 |
| C. Conceptualization and construction of South-South cooperation assessment in Paraguay..... | 146 |
| D. Paraguay: towards an international cooperation policy .....                               | 148 |
| Bibliography .....   | 149 |
| Annex V.A1.....  | 151 |

## Chapter VI

|   |     |
|---|-----|
| Evaluating South-South cooperation: the case of Uruguay.....                          | 155 |
| Introduction.....   | 155 |
| A. Nature of South-South cooperation in Uruguay .....                                 | 156 |
| 1. General features of cooperation in Uruguay .....                                   | 156 |
| 2. Main areas of cooperation and Uruguay's dual role.....                             | 159 |
| B. The debate on the evaluation of South-South cooperation and Uruguay's vision ..... | 165 |
| Bibliography .....  | 174 |
| Conclusions.....  | 177 |

## Tables

|   |     |
|---|-----|
| I.1 South-South cooperation and triangular cooperation initiatives involving Barbados.....          | 41  |
| II.1 Colombia: international cooperation strategies.....  | 66  |
| II.2 Mechanisms of Colombian South-South cooperation.....   | 71  |
| II.3 Recipients of Colombian bilateral South-South cooperation up to 2020.....                      | 75  |
| II.A1.1 Functions and duties of Colombian cooperation agencies.....                                 | 82  |
| III.1 Notable social programmes of Cuban South-South cooperation.....                               | 92  |
| IV.1 Petrocaribe Development Fund Disbursements to Government of Jamaica, 2010–2015.....            | 123 |
| IV.2 South-South cooperation and triangular cooperation initiatives involving Jamaica.....          | 124 |
| V.1 Latin America: policy dilemmas of South-South cooperation policies (operational framework)..... | 147 |
| V.A1.1 Brazil, Chile and Mexico: summary of how South-South cooperation is conceptualized .....     | 151 |
| V.A1.2 Latin America (selected countries): South-South cooperation strategies .....                 | 152 |
| VI.1 South-South cooperation evaluation and measurement systems in Latin America .....              | 170 |

## Figures

|  |    |
|--|----|
| I.1 Barbados: annual growth rate of gross domestic product at constant market prices, 2008–2020..... | 27 |
| I.2 Barbados: external debt as a percentage of GDP, 2008–2017.....                                   | 28 |

|       |  |     |
|-------|--|-----|
| II.1  | Colombia: South-South cooperation resources executed, International Cooperation and Assistance Fund (FOCAI), 2009–2020 ..... | 72  |
| II.2  | Colombia: South-South cooperation actions and projects implemented in Latin America, 2007–2019 .....                         | 73  |
| III.1 | Cuba: South-South cooperation actions and projects with Latin America, 2007–2019 .....                                       | 91  |
| III.2 | Cuba: cooperation with the rest of the world, by sector and modality, 1963–1989 .....  | 94  |
| III.3 | Volume of Cuban cooperation by sectors, 1999–2015 .....  | 95  |
| IV.1  | Jamaica: annual growth rate of gross domestic product at constant market prices, 2008–2020 .....                             | 111 |
| IV.2  | Jamaica: external debt as a percentage of GDP, 2008–2018 .....   | 111 |
| IV.3  | Jamaica: personal remittances, 2012–2019 .....   | 113 |
| VI.1  | Uruguay: total official development assistance (ODA), by type, gross disbursements, 2002–2017 .....                          | 160 |
| VI.2  | Uruguay: total official development assistance (ODA), by type of contribution, gross disbursements, 2002–2017 .....          | 160 |
| VI.3  | Ibero-American South-South cooperation 2008–2018, number of exchanges by type, SEGIB, 2018 .....                             | 167 |
| VI.4  | Key principles for transition countries in deciding with whom and how to cooperate .....                                     | 171 |

## Boxes

|       |  |    |
|-------|--|----|
| II.1  | Colombia: current South-South cooperation regulations and operations ..... | 64 |
| III.1 | International cooperation in Cuban political documents .....               | 88 |
| III.2 | Testimonials from doctors assigned to the Ebola mission in Africa .....    | 97 |

## Foreword

At this time of uncertainty, we reaffirm our commitment to contribute to the economic, social and environmental development of Latin America and the Caribbean and our work to that end. The 2030 Agenda for Sustainable Development is the best road map for the region, and development cooperation is key to its implementation. This book represents an effort by the Economic Commission for Latin America and the Caribbean (ECLAC) to advance knowledge of experiences in evaluating South-South cooperation in Latin America and the Caribbean, with a view to supporting dialogue and enabling regional decision-making in this area in the context of monitoring the 2030 Agenda, the discussions of the ECLAC Committee on South-South Cooperation and the second High-level United Nations Conference on South-South Cooperation (BAPA+40).

The Committee on South-South Cooperation of ECLAC has been in existence for 40 years. It held its first meeting in Montevideo in 1981 as the Committee on technical cooperation among developing countries and regions, before adopting its current name in 2004. Over the course of those years, the Committee has focused attention on the discussion and implementation of several development agendas: the Buenos Aires Plan of Action for Promoting and Implementing Technical Cooperation among Developing Countries; the Millennium Development Goals (MDGs); the 2030 Agenda for Sustainable Development, through the Forum of the Countries of Latin America and the Caribbean on Sustainable Development; the Addis Ababa Action Agenda of the Third International Conference on Financing for Development; and the preparatory process for the BAPA+40 Conference, together with its outcome document and its implementation.

Since 2012, when the first meeting of the Presiding Officers of the Committee on South-South Cooperation was held, and during the terms as

Chair of El Salvador, Peru (2014) and Mexico (2016), the mandates agreed on by the Presiding Officers have included the need to move forward with proposals for the quantitative and qualitative appraisal of South-South cooperation.

This publication, together with some previous studies and the discussion seminar-workshops led by Cuba (2018) and Costa Rica as Chairs of the Committee on South-South Cooperation, is intended to support the region's countries in that undertaking. Within ECLAC, the Committee on South-South Cooperation has worked in conjunction with the Statistical Conference of the Americas and, in 2013, they set up a task force comprising Argentina, the Bolivarian Republic of Venezuela, Brazil, Chile, Colombia, Mexico and Peru to outline and propose a methodological design and road map for measuring South-South cooperation. Within that framework, the Committee has prepared technical notes, conducted case studies in selected countries and, together with other ECLAC subsidiary bodies and divisions, has drawn up proposals for the design of measurement methodologies through the satellite account system and through the monitoring and evaluation of South-South cooperation programmes and projects.<sup>1</sup>

This publication, which addresses the evaluation of South-South cooperation in six selected Latin American and Caribbean countries, is part of a long process of work and reflection by the countries within the ECLAC Committee on South-South Cooperation. I would like to use this opportunity to extend particular thanks to Barbados, Colombia, Cuba, Jamaica, Paraguay and Uruguay for their willingness to participate in the study, the valuable information they provided to construct the cases, the critical commentary on the outcomes given during the seminar-workshops and the discussions their authorities and professional teams held with the researchers.

The South-South cooperation evaluation studies were completed in 2020, the year when the coronavirus disease (COVID-19) pandemic revealed the vast economic and social vulnerabilities of the countries of Latin America and the Caribbean, a middle-income region engaged in a process of transition to development that continues to report significant structural gaps in poverty and inequality, education, gender, productivity and innovation, infrastructure and taxation. Those persistent development gaps, together with the current adversities caused by COVID-19 and its devastating impact, hinder the implementation of the 2030 Agenda

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<sup>1</sup> See ECLAC, "Proposal for measuring South-South Cooperation in Latin America and the Caribbean through a System of Satellite Accounts" [online] [http://www.cepal.org/sites/default/files/events/files/02\\_informe\\_cuentas\\_satelites.pdf](http://www.cepal.org/sites/default/files/events/files/02_informe_cuentas_satelites.pdf) and [http://www.cepal.org/sites/default/files/events/files/02\\_ppt\\_propuesta\\_medicion\\_sursur\\_cuentas\\_satelite.pdf](http://www.cepal.org/sites/default/files/events/files/02_ppt_propuesta_medicion_sursur_cuentas_satelite.pdf), and ECLAC, "Propuesta de medición de la cooperación Sur-Sur en América Latina y Caribe a través del seguimiento y evaluación de programas y proyectos de cooperación Sur-Sur, a cargo de la División de Desarrollo Social de la CEPAL" [online] [http://www.cepal.org/sites/default/files/events/files/03c\\_propuesta\\_de\\_medicion\\_de\\_la\\_cooperacion\\_sur.pdf](http://www.cepal.org/sites/default/files/events/files/03c_propuesta_de_medicion_de_la_cooperacion_sur.pdf).

for Sustainable Development and the achievement of the Sustainable Development Goals (SDGs).

Development cooperation, by offering a solution to address and overcome the crisis, is a key mechanism for fostering international and regional solidarity in the context of the pandemic. It is therefore essential that the countries of Latin America and the Caribbean strengthen South-South and triangular cooperation, in order to promote broader and more fruitful exchanges that will contribute to resolving the specific challenges faced by the countries of the South, without neglecting to adopt a common position and a concerted voice before the world to address global asymmetries and defend the need to renew international cooperation for development in pursuit of a transformative recovery, with no country left behind.

The region needs more political dialogue, more multilateralism, more economic and financial cooperation and more South-South cooperation to develop innovative forms of knowledge-sharing, technology transfers, emergency responses and recovery in the health, economic, social and environmental arenas. It also needs to highlight the value—both quantitative and monetary as well as qualitative and non-monetary— of its South-South cooperation, so it can improve the efficiency and effectiveness of its work and the implementation of its decisions and showcase the ideas, energy and solidarity of Latin American and Caribbean countries in contributing to the achievement of the ambitious and transformative 2030 Agenda for Sustainable Development.

**Alicia Bárcena**

Executive Secretary

Economic Commission for

Latin America and the Caribbean (ECLAC)



# Introduction

Enrique Oviedo<sup>1</sup>

This publication, *Evaluation of South-South cooperation<sup>2</sup> in six selected Latin American and Caribbean countries: shared challenges in implementing the 2030 Agenda for Sustainable Development*, is the result of reflection, research, systematization and discussion by authorities, researchers and cooperation professionals conducted within the framework of the commitments of the Committee on South-South Cooperation of the Economic Commission for Latin America and the Caribbean (ECLAC) in following up on the 2030 Agenda for Sustainable Development and the second High-level United Nations Conference on South-South Cooperation (BAPA+40). It offers keys to understanding the value of South-South cooperation in the region<sup>3</sup> and provides data on the experiences of Latin American and Caribbean countries, both of which are necessary inputs to make progress with the sharing and standardization of methodologies for measuring regional cooperation.

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<sup>1</sup> Political Affairs Officer, Office of the Secretary of the Commission.

<sup>2</sup> The United Nations has defined South-South cooperation as “a process whereby two or more developing countries pursue their individual and/or shared national capacity development objectives through exchanges of knowledge, skills, resources and technical know-how and through regional and interregional collective actions, including partnerships involving Governments, regional organizations, civil society, academia and the private sector, for their individual and/or mutual benefit within and across regions. South-South cooperation is not a substitute for, but rather a complement to, North-South cooperation.” See United Nations (2016).

<sup>3</sup> Issues related to the appraisal of South-South cooperation are combined with political considerations regarding how international development cooperation is perceived. Several different positions exist in that discussion, which Lengyel and Malacalza (2012) summarize simply in terms of two broad paradigms of international cooperation: the aid effectiveness paradigm of the Development Assistance Committee (DAC) of the Organisation for Economic Co-operation and Development (OECD), which emphasizes the evaluation of outcomes and the use of quantitative or monetary indicators, and the horizontality paradigm, the new architecture of South-South cooperation, which focuses on process evaluations and the use of qualitative indicators.

The regional and subregional 2030 Agenda follow-up and review process provides valuable opportunities for peer-to-peer learning, for example, through the exchange of best practices and the discussion of common goals. International cooperation must be effective in pursuit of the 2030 Agenda; for that reason, in this publication ECLAC has decided to share some of those lessons learned that address Sustainable Development Goal (SDG) 17: “Strengthen the means of implementation and revitalize the Global Partnership for Sustainable Development” (ECLAC, 2018a). The SDGs will only be attained through strong partnerships and high levels of cooperation. To paraphrase the 2030 Agenda, inclusive partnerships at the global, regional, national and local levels are essential to strengthen universal peace in larger freedom, eradicate poverty in all its forms and dimensions, ensure sustainable development, guarantee the human rights of all people and achieve gender equality.

The current status of South-South cooperation evaluation in the region’s countries has been preceded by a lengthy process of discussing and acceding to global agreements (with milestones in the Buenos Aires Plan of Action for Promoting and Implementing Technical Cooperation among Developing Countries (BAPA), the 2030 Agenda and BAPA+40), by interventions in binational, subregional and regional cooperation and integration mechanisms, and by actions, programmes and policies for institutional strengthening that include the improvement of organizational capacities and increasing financial resources with positive outcomes for countries’ cooperation experiences.

International cooperation has undergone significant changes in recent decades, including the rising prominence of South-South and triangular cooperation. Within international development cooperation, South-South and triangular cooperation—which are not a substitute for North-South cooperation—have become increasingly relevant for mobilizing resources and bolstering cooperation capacities, as they provide flexible and adaptable solutions to development challenges. South-South and triangular cooperation is notable for its effective contributions to the pursuit of the 2030 Agenda and it has gradually brought together numerous public, private and civil society actors, academics, non-governmental organizations and international agencies to take action on the different dimensions of development: economic, productive, social, environmental and institutional. Similarly, as emphasized at the second High-level United Nations Conference on South-South Cooperation in Buenos Aires in 2019, “the contribution of South-South and triangular cooperation in promoting gender equality and the empowerment of women and girls in sustainable development and encourage further efforts to mainstream gender perspectives in these modalities of cooperation” must be recognized (United Nations, 2019a, para. 19).

In Latin America and the Caribbean, South-South cooperation is seen as an expression of solidarity among peoples and countries of the

South with the aim of contributing to the pursuit of development goals. It is based on principles such as horizontality, solidarity, respect for sovereignty, complementarity, mutual benefit, equity, transparency and accountability. South-South cooperation began in the region at least four decades ago and, since then, it has progressed enormously.

In Latin America and the Caribbean, many South-South and triangular cooperation initiatives are devised and executed in conditions that are particularly conducive to partnership, thanks to the region's shared history and culture, geographical proximities and social and economic complementarities. Both the regional and subregional levels offer important venues for reflection, dialogue and policy coordination, the establishment of agendas, the design and implementation of programmes, projects and activities, and much more (United Nations, 2020).

In historical terms, the major milestone in the development of South-South cooperation under Latin American and Caribbean leadership was the adoption, in 1978, of the Buenos Aires Plan of Action for Promoting and Implementing Technical Cooperation among Developing Countries (BAPA).<sup>4</sup> The objectives of BAPA included promoting national and collective self-sufficiency among developing countries, while taking due account of the necessary support of global interdependence on the path to development. BAPA emphasized that technical cooperation among developing countries was intended to complement traditional development cooperation, and it sketched out broad guidelines for that endeavour. BAPA became a regional and global reference point: its outcome document—which laid the foundations and set the principles for horizontal technical cooperation, leaving behind the vertical, assistance-focused vision of traditional hegemonic cooperation that had prevailed prior to 1978—was the most frequently quoted work in the field of South-South cooperation until 2020.

Another of the many contributions of BAPA was to promote the institutional strengthening of technical development cooperation. By way of example, its influence can be seen in the establishment of the High-level Committee on the Review of Technical Cooperation among Developing Countries in 1980 (known

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<sup>4</sup> The region also played an important role in development cooperation discussions before 1978. ECLAC (2020) relates how the proposal that developed countries should contribute 1% of their gross national product (GNP) to fund development assistance programmes, announced by the World Council of Churches in 1958, is reported to have originated in ideas developed by Sir Arthur Lewis, a Saint Lucian economist, while serving as an economic adviser to the leader of the United Kingdom Labour Party in the 1950s. It also recalls that during the second session of the United Nations Conference on Trade and Development (UNCTAD) in New Delhi in 1968, Raúl Prebisch, in his role as UNCTAD Secretary-General, suggested that developed countries should contribute a minimum of 0.75% of GNP to official development assistance (ODA). In doing so, he pre-empted the recommendation made by the World Bank's 1969 Pearson Report—named after former Canadian Prime Minister Lester Pearson, who chaired the Bank's Commission on International Development—that developed countries should aim to contribute 0.75% of their GNP to official development assistance. See ECLAC (2020, p. 13).

as the High-level Committee on South-South Cooperation since 2003), the creation of the Intergovernmental Follow-up and Coordination Committee on Economic Cooperation among Developing Countries in 1981, the launch of the South Commission in 1986 and the inauguration of the Non-Aligned Movement Centre for South-South Technical Cooperation in 1995 (ECLAC, 2018b).

In the 1990s, amidst the political and economic realignments brought on by the fall of the Berlin Wall and the development and consolidation of globalization, the definition and scope of South-South cooperation became broader and more complex. In 1995, the United Nations General Assembly recognized South-South cooperation as an important element of international development cooperation, an essential basis for national and collective self-reliance and a guarantee for the participation and inclusion of developing countries in the world economy. The General Assembly also introduced the concept of “pivotal countries” to refer to developing countries with the capacity to provide aid and expertise to other countries with similar or lower levels of gross domestic product (GDP) (United Nations, 1995).

In Latin America and the Caribbean, regional integration mechanisms have been recognized—since the 1990s and, increasingly so, in the twenty-first century—as privileged venues for South-South cooperation. This relevance of the regional sphere has arisen at a time when the countries of the South are actively participating in discussions and agreements on the construction of a fairer and more effective architecture for the pursuit of development.

Technical cooperation among developing countries gained momentum and visibility in the 1990s on account of the growing economic and political capacity of some developing countries, as well as the interest, in many of those countries, in exploring development alternatives and designing strategies to assist their societies in addressing the challenges they faced, including globalization, market liberalization, poverty and inequality (Abarca Amador, 2001). From an institutional perspective, the 1990s in Latin America and the Caribbean were a period of increasing financial, technical and human resources—in addition to institutional resources, in the strictest sense—for development cooperation. It was in that context that the region’s first cooperation agencies were created: the Brazilian Agency for Cooperation (ABC) in 1987 and the Chilean Agency for International Cooperation for Development (AGCID) in 1990.

From 2000 onwards, the conceptual refinement of what aid was fair and effective for development was accompanied by an economic boom that led to a significantly increased flows of assistance.<sup>5</sup> Notable during that

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<sup>5</sup> Although, measured in constant prices, the total official development assistance received by the region in the 2000s was higher than in previous decades, in terms of the region’s average gross national income (GNI), the flows trended downwards. Net ODA received by Latin America and the Caribbean fell from the equivalent of 0.9% of regional GNI in the 1960s to 0.5% in the late 1980s and to no more than 0.18% in the 2000s (Vera and Pérez Caldentey).

decade was the International Conference on Financing for Development held in Monterrey, Mexico, in 2002, which produced the Monterrey Consensus of the International Conference on Financing for Development. One of that document's stated priorities was the establishment of partnerships between donors and recipients, particularly in support of those most in need, and it stressed that to be effective, those partnerships had to be guided by the recipient countries' development plans. It also offered guidelines on the mobilization of private and public resources, foreign trade and external debt.<sup>6</sup> Also noteworthy was the 2009 High-level United Nations Conference on South-South Cooperation held in Nairobi, which reaffirmed that South-South cooperation was a common endeavour of peoples and countries of the South, born out of shared experiences and sympathies, free from conditionalities, and based on common objectives and on the principles of solidarity and respect for national sovereignty (United Nations, 2010). The Nairobi outcome document urged the countries of the South to strengthen their capacities in order to embark on the path of development in accordance with their values, aspirations and special needs. It also emphasized that South-South cooperation should not be considered official development assistance (ODA) because, among other reasons, it represented a solidarity-based partnership between equals.

The first decades of the twenty-first century saw the creation of the Peruvian Agency for International Cooperation (APCI) in 2002, the Ecuadorian Agency for International Cooperation (AGECI) in 2007,<sup>7</sup> the Colombian Presidential Agency for Cooperation (APC) in 2011, the Mexican Agency for International Development Cooperation (AMEXCID) in 2011, the Uruguayan Agency for International Cooperation (AUCI) in 2011 (Rivero and Xalma, 2019) and, more recently, the El Salvador International Cooperation Agency (ESCO) in 2020. In the remaining Latin American and Caribbean countries, development cooperation policy, programmes and activities were strengthened through offices or departments within one or more government ministries (see table 1).

The explosion of South-South cooperation in Latin America and the Caribbean led to its promotion through regional integration programmes, with their own funds and cooperation modalities. This was the case with the Community of Latin American and Caribbean States (CELAC), the Southern Common Market (MERCOSUR), the Central American Integration System (SICA), the Caribbean Community (CARICOM), the Pacific Alliance and the Bolivarian Alliance for the Peoples of Our America - Peoples' Trade Agreement (ALBA-TCP). Another innovation in South-South cooperation is

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<sup>6</sup> The 2002 Monterrey International Conference on Financing for Development made policy recommendations and assumed specific commitments on development financing, including urging those developed countries that had not yet met their decades-old commitment of earmarking 0.7% of GNI for ODA to take concrete steps in that direction.

<sup>7</sup> In July 2010, the Ecuadorian Agency for International Cooperation (AGECI) changed its name to the Technical Secretariat for International Cooperation.

the increase in national resources, which provides the means required for the countries’ lofty South-South cooperation policy ambitions. Particularly interesting is the creation of bilateral cooperation funds, such as those Mexico has set up with both Chile and Uruguay.

**Table 1**  
**Latin America and the Caribbean (33 countries): institutional framework for development cooperation**

|               |  | Institution  |  |  |
|---------------|--|--|--|--|
|               |  | Within the Ministry of Foreign Affairs   |  |  |
|               | Cooperation agencies   | Solely within the Ministry of Foreign Affairs  | Within the Ministry of Foreign Affairs and another ministry or department      | Within another ministry or government department |
| Latin America | Brazil, Chile, Colombia <sup>a</sup> , Ecuador <sup>a</sup> , El Salvador <sup>a</sup> , Mexico, Peru and Uruguay <sup>a</sup> | Argentina, Costa Rica, Honduras, Panama, Paraguay and Venezuela (Bolivarian Republic of)   | Guatemala and Nicaragua  | Bolivia (Plurinational State of), Cuba           |
| The Caribbean |  | Antigua and Barbuda, Bahamas, Belize, Dominica, Grenada, Guyana, Saint Kitts and Nevis, Saint Lucia, Suriname, Trinidad and Tobago | Barbados, Dominican Republic, Jamaica, Haiti, Saint Vincent and the Grenadines |  |

**Source:** Prepared by the authors, based on information from the countries, 2021.

<sup>a</sup> In Colombia, Ecuador, El Salvador and Uruguay, in addition to the cooperation agency, there is a department (vice-ministry or directorate) for international cooperation within the Ministry of Foreign Affairs.

In 2015, the international community adopted the ambitious 2030 Agenda for Sustainable Development, which recognizes the important role of South-South cooperation in achieving its targets and its Sustainable Development Goals (SDGs). The 2030 Agenda —along with other important instruments such as the Addis Ababa Action Agenda,<sup>8</sup> the Paris Statement and the Sendai Framework for Disaster Risk Reduction 2015–2030— promotes South-South cooperation activities as a complement to North-South, triangular and multilateral cooperation in strengthening international development cooperation.

Similarly, the regional and subregional integration mechanisms that were highlighted as major venues for the development of South-South cooperation in the 1990s reached their full potential as of 2000, a time when the countries of the South were also actively participating in discussions and

<sup>8</sup> The Addis Ababa Action Agenda (2015) identifies the challenges in implementing the 2030 Agenda and the SDGs. In paragraph 66 it states that “development finance can contribute to reducing social, environmental and economic vulnerabilities and enable countries to prevent or combat situations of chronic crisis related to conflicts or natural disasters” (United Nations, 2015).

agreements on the construction of a fairer and more effective architecture for development. Since then, Southern stakeholders have been keen to promote partnerships, share learnings and exchange knowledge, experiences and practices, and they have increasingly emphasized South-South cooperation as a tool to address persistent development challenges and achieve the Goals of the 2030 Agenda.

Within the region, the Forum of the Countries of Latin America and the Caribbean on Sustainable Development<sup>9</sup> has evolved into a leading venue for strengthening relations between the countries of the South and, at the same time, fostering North-South dialogue on cooperation issues. At the Forum, the region has stressed the need for new cooperation criteria and methods and for a return to multilateralism with multilateral cooperation at several levels that includes new and traditional stakeholders, new sources of financing, technical assistance, debt reduction, technology transfer and new strategic alliances.

In 2019, at the second High-level United Nations Conference on South-South Cooperation (BAPA+40) (United Nations, 2019b), the countries present underscored the importance of designing a methodology to measure the impact of South-South cooperation and to gather empirical evidence in order to mobilize additional resources for achieving the ambitious 2030 Agenda. Accordingly, the BAPA+40 outcome document urged developing countries to develop their own systems to assess the quality and impact of South-South and triangular cooperation programmes and to improve data collection at the national level to promote cooperation in the development of methodologies and statistics, in line with the specific principles and unique characteristics of South-South cooperation. It encouraged actors to support, at the request of developing countries, efforts to collect, coordinate and disseminate information and data and to evaluate South-South cooperation. It also invited interested developing countries to engage in consultations and forums on non-binding voluntary methodologies, building upon existing experiences, taking into account the specificities and different modalities of South-South cooperation and respecting the diversity within South-South cooperation and within national approaches. Finally, the BAPA+40 outcome document recognized the interest of some developing countries in establishing a methodology for appraising and evaluating South-South and triangular cooperation (United Nations, 2019b, paras. 25 and 26).

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<sup>9</sup> At the thirty-sixth session of the Economic Commission for Latin America and the Caribbean (ECLAC), held in Mexico City from 23 to 27 May 2016, the member States adopted resolution 700(XXXVI), Mexico Resolution, which established the Forum of the Countries of Latin America and the Caribbean on Sustainable Development as a regional mechanism to follow up and review the implementation of the 2030 Agenda for Sustainable Development, including the Sustainable Development Goals and targets, its means of implementation, and the Addis Ababa Action Agenda (see [online] <https://foroalc2030.cepal.org/2021/es/antecedentes>).

As with the 1978 Buenos Aires Plan of Action (BAPA), in 2019 the BAPA+40 Conference charted a path for the coming years that involved promoting stronger links between the countries of the South through increased technical, financial, social and political cooperation. South-South cooperation should be an important tool for linking countries, especially for sharing knowledge, experience, technology and resources to address development challenges, while at the same time protecting the principles of solidarity and national ownership. As an example of the region's contributions to the discussions and agreements, the CARICOM Member States have highlighted the role of South-South cooperation in the implementation of the 2030 Agenda as a mechanism for strengthening resilience in managing the impact of natural disasters, together with the growing importance of that cooperation in developing partnership options for middle- and high-income developing countries (Antigua and Barbuda, the Bahamas, Barbados, Belize and Jamaica).<sup>10</sup>

Shortly after the outcome document of PABA+40 and the Decade of Action for the Sustainable Development Goals were agreed on, the world came up against the coronavirus disease (COVID-19) pandemic and its severe economic and social consequences. The COVID-19 pandemic has dramatically changed prospects for Latin America and the Caribbean. More than ever, the region must now strengthen its regional, political and economic agreements, deepen its intraregional cooperation ties and resolutely adopt a common voice before the world.

The context, which has been intensified by the current situation, has strengthened the position of those in Latin America and the Caribbean who are calling for a rapid reconfiguration of different forms of cooperation in order to meet the current needs of developing countries in transition. South-South cooperation is expected to play a strategic role by complementing the other forms of cooperation, innovating, deploying its best programmes and projects and demonstrating its worth through its actions and products and their economic and social fruits.<sup>11</sup> The region has experience with bilateral and triangular South-South cooperation and other regional modalities guided by the goal of creating and building capacities that have contributed to the countries' development. There is, however, a regional deficit in the systematization of those experiences, their monetary and non-monetary appraisal and the evaluation of their impact, which has prevented them from showcasing the enormous contributions they make international development cooperation.

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<sup>10</sup> See ECLAC (2020, p. 16).

<sup>11</sup> As an example, the experience of the Caribbean during the pandemic has revealed the critical importance of countries' health, education and social protection infrastructure, it has highlighted the vulnerability of marginalized sectors of Caribbean populations, it has emphasized the worth of regional cooperation and coordination and it has dramatically demonstrated the urgent need to strengthen digital infrastructure and to build more resilient economies and societies (ECLAC, 2020, p. 19).

This book presents case studies on the evaluation of South-South cooperation in six selected Latin American and Caribbean countries: Barbados, Colombia, Cuba, Jamaica, Paraguay and Uruguay.

Chapter I analyses South-South cooperation in Barbados and examines the use given to the term “evaluation”, which the researchers interpret as meaning the operationalization and quantification of the value of South-South cooperation. It also analyses the theoretical guidelines used to define this type of development cooperation and to explain the concept and its various dimensions. Finally, the chapter describes the methodologies deployed and the techniques, instruments and procedures used to measure and evaluate South-South cooperation.

Chapter II explores Colombia’s experience with South-South cooperation. It offers an in-depth analysis of the regulatory and conceptual framework for cooperation, the most commonly used instruments and modalities and the priority recipient regions for Colombian cooperation. It examines the rhetoric that constitutes South-South cooperation discourse in Colombia with a view to harmonizing the methodologies used for systematizing and assessing South-South cooperation in the region. In recent years, the Colombian Presidential Agency for International Cooperation (APC Colombia) has made a major technical effort to systematize cooperation from a quantitative and added-value approach. After analysing the institutional framework for Colombian cooperation and some historical implementation data, the chapter delves into the added-value methodology and its relationship with national development plans and South-South cooperation strategies. The chapter concludes by identifying some of the challenges for the evaluation proposal that exist at the national and regional levels.

Based on an analysis of official documents and the guidelines of Cuban economic and social policy, chapter III provides a historical analysis of the regulatory and legal framework that identifies continuities and ruptures in how South-South cooperation is perceived in Cuba. An analysis of Cuba’s bilateral, regional and multilateral South-South cooperation experiences from 1960 to the present sheds some light on national strategies for evaluating South-South cooperation. The analysis of Cuban cooperative practice shows that the country favours a qualitative and knowledge-transfer model based on the defence and recognition of the guiding principles of South-South cooperation. The chapter concludes with a critical reading of the lessons of Cuba’s experience with South-South cooperation and how they can be applied by other countries in Latin America and the Caribbean. Finally, a number of recommendations are given for improving the country’s system for collecting and managing statistics on this type of cooperation.

Chapter IV contains the Jamaican case study. Reference is made to the influences of the country's political and economic history on the initial configuration of South-South partnerships in foreign policy and diplomacy. Jamaica's long-term development challenges—including high indebtedness and low growth—are then described. Emphasis is placed on the continuity of the development objectives set by Jamaica since the 1990s, which have influenced the direction of its development partnerships, including its South-South relations. Jamaica's operational understanding of South-South and triangular cooperation is also explored in depth.

The study on Paraguay in chapter V comprises six substantive sections highlighting the evolution of international cooperation: (i) from assistance-based cooperation to cooperation for development, (ii) progress towards strengthening horizontality in cooperation, (iii) milestones in horizontal cooperation, (iv) South-South cooperation as an institutional structure seeking to strengthen itself, (v) notable examples of South-South cooperation, and (vi) international cooperation policy. The authors note that in Paraguay, international cooperation has only recently begun to develop significantly, thanks to the participation of its authorities and technical professionals in regional and extraregional forums and other venues. Its incipient progress means that the country is in the process of consolidating its dual role within South-South cooperation, as a prior step to the adoption of a multidimensional theoretical and operational definition that would allow for its evaluation.

Finally, the three sections of chapter VI examine the case of Uruguay. The first is a background section that describes the consolidation of the international development cooperation system in general and the institutional development of international development cooperation in Latin America. Section two is devoted to a description of Uruguayan South-South cooperation, identifying its general characteristics and the main areas of cooperation addressed by Uruguay in its dual role. The third section deals with the debate on the evaluation of South-South cooperation and Uruguay's vision. The country has made significant progress with the design and implementation of a system for evaluating its South-South cooperation. According to the study, Uruguay—like much of the region—has been critical of the possibility of endorsing a traditional system for evaluating cooperation based on the quantification of the economic resources involved. Instead, Uruguay has argued that the crucial element is not the quantitative volume of cooperation, but rather the value it adds to an inclusive, innovative and rights-based agenda focused on sustainable development and other goals.

In line with the ECLAC "Caribbean First" strategy, the Caribbean case studies—Barbados and Jamaica—highlight the subregional particularities that broaden the regional perspective of South-South and triangular cooperation, taking account of exchanges with other small island developing States (SIDS)

that are also members of the Organization of African, Caribbean and Pacific States (OASECP) and the Commonwealth, among others.

As explained in ECLAC (2020), the international relations of most CARICOM member States have evolved differently from those of their Latin American neighbours because their history as independent nations is recent<sup>12</sup> and because their geographical location and the development of their international political relations, foreign trade agreements and cooperation agreements<sup>13</sup> are the product of their identities as small, vulnerable developing States within the Commonwealth and the United Nations and as African, Caribbean and Pacific (ACP) developing countries that are signatories to the Lomé Convention<sup>14</sup> and the Cotonou Agreement.<sup>15</sup> Given their particular international situation, they have forged special links with member countries of the Organisation for Economic Co-operation and Development (OECD) and with multilateral development agencies, and they have acquired increasingly broad cooperation agendas with various countries and groupings in the South on a variety of development-related issues.

This publication aspires to contribute to the discussion and, at the same time, to serve an input for the design of methodologies for evaluating regional South-South cooperation that integrate innovatively with the new construction of post-pandemic international cooperation, incorporating awareness of gender and disability and other perspectives, and supporting the countries of Latin America and the Caribbean in their transition towards development and towards the achievement of the 2030 Agenda for Sustainable Development and its Sustainable Development Goals.

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<sup>12</sup> The Caribbean countries gained their independence between 1962 and 1983, more than a hundred years later than the countries of Latin America (ECLAC, 2020, p. 16).

<sup>13</sup> The foundations of their international relations included the building of the main regional community (CARICOM), followed later by the Organisation of Eastern Caribbean States (OECS) and the Association of Caribbean States (ACS). Other elements therein included the subregion's ties with the United Kingdom, the United States and Canada, the European Community (as then constituted) and its Latin American neighbours. Following independence, they also became members of the United Nations and of the Commonwealth, which would later become important incubators of ideas and advocates for the interests and concerns of small developing States. In the 1970s, as the United Kingdom was preparing to join the European Community, the CARICOM countries joined forces with the developing countries in Africa and the Pacific that had benefited from Commonwealth trade preferences in the British market to negotiate with the European Community for preferential market access for their raw material exports. The resulting grouping of African, Caribbean and Pacific (ACP) developing countries with preferential access to the European Community market became another important community of interest to which the CARICOM countries belonged. The ACP Group later became the Organization of African, Caribbean and Pacific States (OASECP) (ECLAC, 2020, pp. 16 and 17).

<sup>14</sup> The framework governing cooperation between the European Community and its member States, on the one hand, and the African, Caribbean and Pacific (ACP) States, on the other, with the aim of accelerating the economic, cultural and social development of the ACP States and intensifying exchanges of all kinds between them and the European Community.

<sup>15</sup> Partnership agreement between the European Union and its member States on the one hand, and 79 African, Caribbean and Pacific (ACP) States on the other. It was signed in June 2000 and came into force in April 2003, for a period of 20 years. It regulates all aspects of the privileged development cooperation relationship that the European Union maintains with this group of States.

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## Chapter I

# Experience with South-South cooperation: the case of Barbados<sup>1</sup>

*Jessica Byron  
Jacqueline Laguardia Martínez*

## Introduction

Barbados became independent in 1966. Since 1955, the country has had two major political parties, the Barbados Labour Party (BLP) and the Democratic Labour Party (DLP).<sup>2</sup> The Barbados Labour Party won the general election of 2018, gaining all 30 seats in the House of Assembly and 72.8% of the popular vote. The government is led by Mia Amor Mottley, Barbados's first female prime minister.<sup>3</sup>

Barbados's foreign policy is characterized by "prudence, pragmatism and an overwhelming consciousness of small size and limited resources" (Byron, 2007, p. 220). Francois Jackman (2016, p. 1) contends that during its first fifty years of independence, Barbados "remained within the international relations paradigm it had inherited from the United Kingdom",

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<sup>1</sup> For a full analysis, please see ECLAC (2020a).

<sup>2</sup> See [online] [www.caribbeanelections.com/bb/education/country\\_profile.asp](http://www.caribbeanelections.com/bb/education/country_profile.asp).

<sup>3</sup> See [online] <https://gisbarbados.gov.bb/government/>.

which resulted in a foreign policy marked by continuity and conservatism. However, as of the mid-1990s, Barbadian foreign policy and diplomacy were increasingly oriented towards international repositioning in a changing global political economy. The key spheres of action were national security matters, trade and economic well-being, promoting a positive image for the country, the protection of citizens overseas, engaging the diaspora and attending to regional economic integration and cooperation.<sup>4</sup>

The core maxim for the foreign policy of Barbados was articulated by the country's first prime minister, Errol Barrow, who in his address to the twenty-first session of the United Nations General Assembly in 1966 stated that Barbados would be a "friend of all, satellite of none". His speech contained two main ideas: Barbados's foreign policy would be ideologically neutral, and it would reflect domestic policy and priorities. The country would deepen its commitment to such principles by joining the Non-Aligned Movement (NAM) in 1983 (Jackman, 2016). This is significant as NAM, ever since its origins, has been characterized by a South-South ethos and relations among its member countries are based on the concepts at the core of South-South cooperation: sovereign equality, solidarity, common interests, shared values and cooperation.

A key element of Barbados's foreign policy has been the promotion of multilateralism. Hackett (2019, p. 225) exemplifies this perception of the importance for the United Nations system.<sup>5</sup> Within the United Nations, Barbados has played an active role not only in the caucus of Caribbean Community (CARICOM) Ambassadors, but in the Latin America and Caribbean Group (GRULAC), the Group of 77 and China, NAM and the Alliance of Small Island States (AOSIS), among others (Hackett, 2019) and in the World Trade Organization, most notably in the deliberations of the Small Economies Working Group, founded in 2002 (WTO, 2011).<sup>6</sup>

Like Jamaica and many other Caribbean and Latin American countries, Barbados systematically articulates the vulnerability and development challenges being faced by middle-income developing countries and looks for maximum visibility and leverage in multilateral negotiations through its South-South cooperation partnerships in the United Nations, the former African, Caribbean and Pacific States (ACP) and new Organization of African, Caribbean and Pacific States (OACPS), networks of small island developing States (SIDS) and the Commonwealth. As a small State highly vulnerable to external shocks, Barbados has

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<sup>4</sup> See [online] <https://www.foreign.gov.bb/history/>; <https://www.foreign.gov.bb/vision-and-mission/>; also Tudor (1987), cited in Jackman (2016, p. 4).

<sup>5</sup> "Barbados should remain committed to the United Nations as the best guarantor of the existence and sovereignty of small island states. The UN remains the most respected global forum in which the national priority interests of small, vulnerable states can be effectively promoted."

<sup>6</sup> See also Nicholls, 2016.

championed the need for special and differentiated treatment, calling for small economies in multilateral forums such as the United Nations and WTO “to be given longer timeframes in which to implement their obligations, a special safeguard facility to be used to counteract the severe effects of opening up certain sectors, the exclusion of sensitive products related to food security, rural development and poverty alleviation” (Byron, 2007, p. 219). In that regard, Barbados hosted the Global Conference on the Sustainable Development of Small Island Developing States in 1994 where the agreed final document, the Programme of Action for the Sustainable Development of Small Island Developing States, addressed SIDS developmental vulnerabilities and proposed a comprehensive strategy to mitigate them.

The Barbados Programme of Action reaffirmed the commitments articulated in Agenda 21 adopted in 1992. The Barbados Conference was the first to address sustainable development after the 1992 United Nations Conference on Environment and Development (UNCED), also known as the Earth Summit. “The successful negotiation of a development platform for small island developing States, agreed by the UN family of nations was not a small achievement. The Barbados Program of Action agreed that SIDS are peculiarly vulnerable to external environmental and economic shocks” (Hackett, 2019, p.60).

A significant dimension of Barbados’s identification as a small island developing State is its participation in AOSIS. The Alliance was established in 1990 during the Second World Climate Conference in Geneva and functions as a lobby and platform for SIDS in the United Nations system to ensure that their concerns are given full attention considering their particular development challenges (Hackett, 2019).

Barbados is also a member of OACPS (the successor to ACP, which was established in 1975) as a coordinating group composed of the ACP signatories to the various Partnership Agreements between ACP and the European Union that have been in place between 1975 and 2020. The ACP countries regard South-South cooperation and technical cooperation as key elements to transform development cooperation by enhancing the participation of emerging economies. They have proposed the establishment of an international South-South Economic Cooperation (Ibero-American Programme to Strengthen South-South Cooperation/SEGIB, 2018). Barbadian representatives played key roles in the negotiation of the Cotonou Agreement in 1998 to 2000, and in the negotiation of the Caribbean Forum of African, Caribbean and Pacific States (CARIFORUM)-European Union Economic Partnership Agreement between 2004 and 2007 (Byron, 2005 and 2007).

The other significant dimension of Barbados's commitment to multilateralism has been its promotion of regionalism and regional economic integration. From the creation of the Caribbean Free Trade Association (CARIFTA), born from a meeting between Prime Ministers Errol Barrow of Barbados and Forbes Burnham of Guyana in 1965, to the establishment of CARICOM in 1973, Barbados has defended the necessity of deepening Caribbean integration—without compromising its own sovereignty—as a key step for small Caribbean States to survive in the global economy. For several years as of 1999, as part of a “quasi-cabinet” governance arrangement of the CARICOM Heads of Government, Barbados held the portfolio for supervising the implementation of the provisions of the CARICOM Single Market and Economy (Byron, 2007, p. 222).

Barbados is also a founding member of the Association of Caribbean States (ACS), established in 1994, a regional grouping of CARICOM States and other States and territories that surround or are located within the Caribbean Sea and its environs. ACS promotes cooperation among the actors of the Greater Caribbean and, since 2017, has convened an annual Cooperation Conference. Given its membership, this mostly entails South-South and triangular cooperation. Barbados's interests coincide with ACS initiatives in the protection of the Caribbean Sea and disaster risk reduction.

In terms of socioeconomic overview, Barbados is the most easterly of the Caribbean islands, and its land surface covers 431 km<sup>2</sup> (Ministry of Finance and Economic Affairs of Barbados, 2013). According to the World Bank, it is one of the most densely populated countries in the Western hemisphere, with an estimated population of 287,025 in 2019.

Barbados is ranked very high on the United Nations Development Programme (UNDP) Human Development Index, with a figure of 0.814 in 2019. However, its global position has slipped in recent years, from fifty-first in 2017 to fifty-eighth in 2021 out of 189 countries. According to 2018 figures, life expectancy at birth was 79.1 years. The literacy rate that year was 99.6% (ECLAC, 2019a). The Gender Development Index (GDI) was 1.010 in 2018 (UNDP, 2019). The total fertility rate was 1.3 children per woman. Recent unemployment rates have ranged from 11.7% in 2015 (PAHO, 2021) to 9.2% in 2018 (Deloitte, 2019).

Trade per capita was, on average for 2016–2018, US\$ 7.158 and represented 41% of GDP (WTO, 2019). Since 2008, the Barbadian economy “has experienced mostly flat growth, a clear indication of the slowdown in economic activity in the major economies of Europe and North America which generate the majority of Barbados's business” (WTO Trade Policy Review, 2014, p. 4). GDP growth estimations for 2020 are heavily affected by the coronavirus disease (COVID-19) pandemic and its impact on Barbados's main economic activities (see figure I.1).

**Figure 1.1**  
**Barbados: annual growth rate of gross domestic product**  
**at constant market prices, 2008–2020**



**Source:** Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of official data, and ECLAC, *Statistical Yearbook for Latin America and the Caribbean*, Santiago, 2015, 2016, 2017, 2018 and 2019.

Barbados depends largely on income from services, particularly tourism and financial services. Since independence in 1966, governments have sought to diversify the economy away from sugar, historically the major export product. The manufacturing sector and tourism became the major foreign exchange earners in the 1970s and, by the 1990s, there was a growing offshore financial services sector (Ministry of Finance and Economic Affairs of Barbados, 2013).

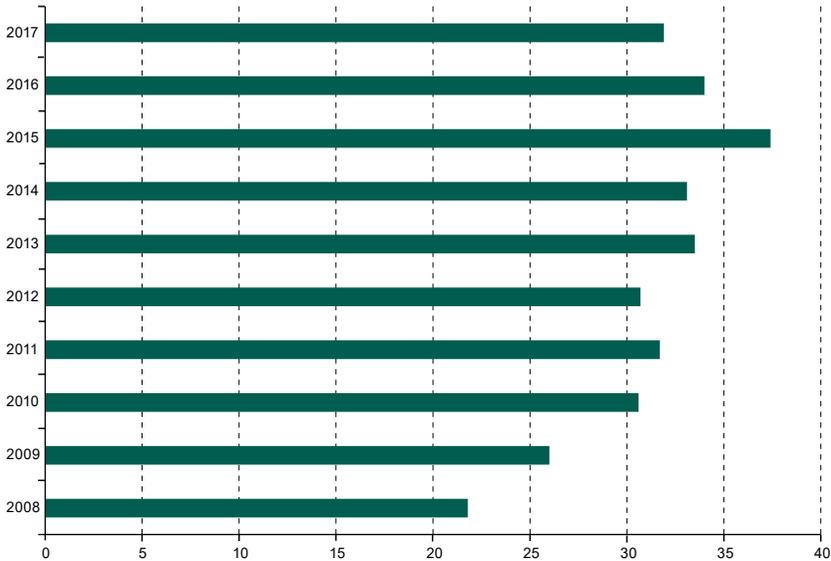
Barbados's macroeconomic situation already showed stagnant growth, tight fiscal policy and structural economic weaknesses (EIU, 2018). In the late 1980s, the economy struggled with rising debt and productivity challenges that led to an International Monetary Fund (IMF) Structural Adjustment Programme in 1991 (Byron, 2007). By 1994, there were signs of recovery with a GDP growth rate of 2.2%, but its definitive transformation into a service economy made Barbados increasingly dependent on tourism and international capital markets. External shocks in 2001 and 2008 induced "restrictions in output, increase in unemployment and ... an increase in transient poverty" (Ministry of Finance and Economic Affairs of Barbados, 2013, p. 5).

Barbados was heavily impacted by the global financial crisis starting in 2008. IMF estimates suggest that Barbados was hit much more severely compared to other tourist-dependent Caribbean territories. As consequence of the crisis, the country experienced a downturn in tourism arrivals, a decline in the construction sector and the failure of the financial

conglomerate CL Financial and its Barbados-based subsidiaries. Tourist arrivals from the United States and the United Kingdom fell a cumulative 5.9 percentage points between 2008 and 2014, while total stay-over arrivals fell 9.0% cumulatively compared to an average of 0.9% (Dowling, Mwase and Gold, 2016, p. 10). Even when measurement problems and inconsistencies in data hinder an understanding of the economic dynamics, “estimates of economic developments based on nominal GDP and inflation suggest that Barbados’s performance since the crisis was substantially worse than its peers” (Dowling, Mwase and Gold, 2016, p. 6).

Barbados’s fiscal deficit increased from 4.8% to 8.8% of GDP between 2008 and 2010. In 2013, it was 11.8% of GDP (WTO, 2014). At the beginning of 2008, Barbados’s national debt was 74.2% of GDP. The global economic shock resulted in a sharp increase in debt and, by September 2018, the debt-to-GDP ratio was 145.9% (ECLAC, 2019b). That year, the government announced the restructuring of public sector debt to create fiscal space and facilitate the reconstruction of international reserves. Debt obligations were rescheduled except for bilateral and multilateral liabilities and savings bonds (Central Bank of Barbados, 2019). The country entered into a new IMF Extended Fund Facility arrangement for special drawing rights (SDR) of US\$ 208.0 million (IMF, 2019) as part of the Barbados Economic Recovery and Transformation Plan (ECLAC, 2019b). As of the end of 2019, the debt was estimated at 115.4% of GDP (IDB, 2019) (see figure I.2).

**Figure I.2**  
**Barbados: external debt as a percentage of GDP, 2008–2017**



**Source:** Economic Commission for Latin America and the Caribbean (ECLAC), *Statistical Yearbook for Latin America and the Caribbean*, Santiago, 2015, 2016, 2017 and 2018.

In 2013, Barbados adopted a Growth and Development strategy for the period 2013-2020 in order to “institute a sequence of managed structural adjustments and reforms...critical to the country’s sustainable economic, human and social development over the planning horizon 2013-2020” (Ministry of Finance and Economic Affairs of Barbados, 2013, p. 1). The goal was to achieve economic growth of 4.5% by 2020.

Supporting the strategic vision are four objectives: “1. Return the economy to a sustainable growth rate of 3 per cent while maintaining macroeconomic stability; 2. Facilitate broad based adjustments and reforms in the economy; 3. Enhance social and human development; and 4. Enhance energy and environmental sustainability in the context of the Green Economy” (Ministry of Finance and Economic Affairs of Barbados, 2013, p. 1).

It is interesting to note that Barbados is a destination for immigrants as well, usually Caribbean people seeking better paid jobs. Barbadian migrants are present in various destinations, but hard statistics on the subject are scarce. In contrast to other Caribbean and Central American countries, the Barbadian economy is not significantly dependent on remittances. Although small in total value, remittances rank medium in international comparisons as a share of GDP (CEMLA/IDB, 2010, p. 6).

Barbados is also vulnerable to extreme meteorological events, particularly climate change, which carry risks for the major economic sectors, the water supply, health, productivity, competitiveness, economic growth and development (Ministry of Finance and Economic Affairs of Barbados, 2013, p. 87). The country’s impressive human development achievements are a double-edged sword, since they have also resulted in ineligibility for concessional development finance ever since Barbados was classified as a high-income developing country. Consequently, throughout the economic shocks of the last decade, Barbados had limited or no access to official development assistance (ODA) to invest in its development agenda.<sup>7</sup> Barbadian public officials and policy documents have consistently sought to highlight this situation and advocate for mitigating action from the international community. At the first Annual Ministerial Review of the United Nations Economic and Social Council in 2007, Barbados presented a National Report on its progress in formulating and implementing its national development strategy within the context of the United Nations global development agenda of the Millennium Development Goals (MDGs) (Hackett, 2019, pp. 130–131). Hackett refers to the “inconsistencies in the global partnership for development arrangements”, stating that the Barbados report “requested the international community to provide

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<sup>7</sup> Barbados was removed from the Development Assistance Committee of the Organisation for Economic Co-operation and Development (OECD/DAC) list of eligible beneficiaries of development assistance in 2011 (OECD, 2019). However, long before that, during the latter 1980s, concessionary development financing flows to Barbados had been reduced and, by 1990, ODA amounted to only 0.2% of the country’s GDP and, by 2000, 0% of GDP (UNDP, 2009, p. 19).

appropriately equitable access to ODA and to increase and improve ODA for middle-income countries, especially in the areas of technical cooperation and budgetary assistance” (Hackett, 2019, p. 131). The following statements by Barbadian officials further articulate these concerns:

While we welcome the initiatives to create rescue packages for the least developed countries (LDCs), there is a clearly demonstrated need to expand these initiatives to include a wider group of developing countries. Barbados is one of a small group classified as small highly indebted middle-income countries, which has been overlooked, but which is deserving of international attention and assistance from both bilateral partners and the multilateral institutions. As we discuss the effects of the global crises and propose assistance for affected countries, there is need to ensure that countries like Barbados are recognised within the broad category of small vulnerable economies.

Multilateral agencies such as the World Bank, have established through empirical research and their ongoing interventions that these countries are unique in the openness of their economies and in their susceptibility to external shocks. However, this grouping continues to be excluded from concessionary financing and debt relief. Focus continues to be placed on per capita income data, which is a poor indicator of economic sustainability, and national vulnerability. Our countries are in need of adequate support mechanisms with revised eligibility criteria, in order to prevent the derailment of our development processes. (Government of Barbados, 2009).

The prevailing development and differentiation policy of donors, which is based on per capita income indices, favours lower income countries and disadvantages middle and higher income countries. This is a concern for Barbados and the Latin American and Caribbean (LAC) region. There is ongoing debate over the suitability of using per capita income as the main criterion for ODA allocation as it discounts other important distributional indicators of development like equity. The LAC region has been lobbying the international community for a re-think of this policy. (Government of Barbados, 2013, p. 4).

Barbados takes this opportunity to express once again its deep concern at being penalised for any success that it achieves in its development efforts. Its categorisation as a Middle Income Country with the resulting restriction in access to international development assistance and concessionary financing is unfair and does nothing to advance the cause of sustainable development. We reiterate our

call on the international community to create an enabling global environment and partnership for development. Countries such as mine require assistance in building economic resilience not challenges such as de-risking, black listing and indebtedness. (Government of Barbados, 2017).

Barbados has faced daunting setbacks to its 2013–2020 Growth and Development strategic vision as a result of the COVID-19 global pandemic. Up to the present, the most negative potential health impacts have been contained. As of 15 November 2020, Barbados had registered 250 COVID-19 cases, of which there had been 238 recoveries and seven deaths (Loop News, 2020a). However, the country has spent an estimated 19.2% of GDP on fiscal measures to mitigate the social and economic impact and to foster social cohesion and stability (ECLAC, 2020c). Barbados's social security system provides institutionalized unemployment benefits and this feature was supplemented with temporary benefits for self-employed individuals who contribute to the system. The unemployment rate has remained around 11% for some years but this is expected to rise as a knock-on effect of the pandemic (ECLAC, 2020c). As indicated before, Barbados's negative growth rate projections for 2020 are significant, ranging from -8.8% to -11.6% (ECLAC, 2020c; IDB, 2020). Tourism arrivals across the Caribbean are projected to plunge in 2020 by anywhere from 58% to 76% (ECLAC, 2020c). The World Tourism Organization places Barbados among the most vulnerable SIDS in terms of its exposure to the projected deleterious economic impact of the COVID-19 pandemic (UNWTO, 2020).

Indeed, Prime Minister Mia Mottley has on various occasions called for the use of a Vulnerability Index to substantiate small developing States' claim for more support from the international community. She proposes a rethinking of the role of the Bretton Woods institutions (BWIs) and a revisiting of the Vulnerability Index that was championed by the Commonwealth Secretariat and Commonwealth small States in the late 1980s. In the contemporary context, vulnerability indicators should re-examine the exposure of developing countries to trade and financial volatility, economic and public health issues and to the risks posed by climate change. The latter should lead to natural disaster clauses being introduced into sovereign debt agreements (Chance, 2019; Nurse, 2020; Remy, Cotton and Nicholls, 2020; *News Americas Now*, 2020). In the current scenario, when accessing development financing has become increasingly difficult for most Caribbean countries, South-South Cooperation should be viewed as an additional and significant means to complement ODA and to explore all possible alternative approaches to the effective utilization of resources for development.

## **A. Definitions of South-South cooperation and triangular cooperation used in Barbados, which shape the understanding of the process and related policy formulation**

There is no single definition of South-South cooperation in Barbados, although it appears to have a basic understanding of South-South cooperation that refers to international cooperation between and among developing countries or with emerging economies, consisting basically of the exchange of resources, capacities and good practices. Countries involved in South-South cooperation share similar perceptions of development obstacles and work together to identify strategies and actions to overcome development challenges.

It is useful to refer to the words of a retired former Permanent Representative of Barbados to the United Nations in New York between 2003 and 2010:

South-South Cooperation ... is a broad framework for collaboration among countries of the South, principally in the economic, social and environmental areas. It represents the efforts of developing countries to collaborate among themselves with a view to achieving development, and involves the exchange of resources, technology and knowledge between developing countries, to assist in meeting their development goals. This includes increased volumes of South-South trade, South-South flows of foreign direct investment, technology transfers, and the sharing of solution and experts. (Hackett, 2019, p. 110).

Therefore that shared perspective on South-South cooperation appears as an exchange of knowledge and expertise among developing nations, mostly in the political, economic and technical dimensions. When South-South cooperation is supported by one or more developed countries or multilateral organizations, it is understood in Barbados as triangular cooperation. Conversations with Barbadian government officials, diplomatic representatives and academics led to the conclusion that their understanding of triangular cooperation coincides with the definition provided by the United Nations Food and Agricultural Organization (FAO): “two or more countries of the global South in collaboration with a third party, typically a multilateral institution, traditional resource partner, or emerging economy, facilitating SSC through the provision of technical or financial resources” (FAO, 2016, p. 1). In such arrangements, the developing countries usually contribute with know-how while developed nations provide financial support (Huitrón-Morales, 2016). It is conceived as a bridge between the traditional North-South cooperation and South-South cooperation.

In addition, South-South cooperation in the country is widely identified with technical cooperation among developing countries. In Barbados, it seems to be customary to speak of “technical cooperation”, “triangular cooperation” or just “cooperation” rather than South-South cooperation. This terminology is also found widely in the media and popular discourse. According to Domínguez Martín (2017), similar perceptions in Latin America represented a reductionist vision of South-South cooperation as a complementary phenomenon to North-South cooperation.

However, it is also suggested that in Barbados, South-South cooperation may fit into the conceptual framework provided by Ayllón Pino (2015). This encompasses the notion that South-South cooperation is not only a mechanism for cooperation, it may be a tool for international projection and a philosophy of mutual support that includes political dialogue, trade, financial and technical cooperation and the promotion of regional integration. South-South cooperation should also facilitate knowledge sharing on best practices for more efficient use of human, financial and technical resources.

The absence of a widely shared, well-defined conceptualization of South-South cooperation in Barbados may be related to several factors. One reason might be the limited role and place that Barbados has thus far accorded to South-South cooperation. The potential importance for national development and for strengthening alliances among developing countries is also recognized. However, that recognition has not yet been translated into a firm strategy for conceptualizing, initiating, recording, monitoring and evaluating South-South cooperation actions and their impact in Barbados.

## **B. Historical antecedents to contemporary South-South cooperation in Barbados**

Barbados has some historical experience of South-South cooperation, generally referred to as technical cooperation. Minister for Foreign Affairs and Foreign Trade Jerome Walcott stated that Barbados has participated in South-South cooperation mainly as a recipient country.<sup>8</sup> Barbados acknowledges that South-South cooperation has a central place within the global multilateral system, the 2030 Agenda for Sustainable Development and the implementation of the 2014 SIDS Accelerated Modalities of Action (SAMOA) Pathway.<sup>9</sup>

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<sup>8</sup> Remarks by Jerome Xavier Walcott at the second High-level United Nations Conference on South-South Cooperation, Buenos Aires, 20 March 2019.

<sup>9</sup> For a detailed discussion of national, regional and global efforts in this regard, see Government of Barbados 2013.

Although Barbados has not advanced very far in defining the various aspects of South-South cooperation from its own experience, or in visualizing and exploring the potential significance in the context of national development, the country has been involved in global debates about the nature and role of South-South cooperation and triangular cooperation among SIDS. On two occasions, Barbados has hosted significant meetings related to South-South cooperation: the First Global Conference on the Sustainable Development of Small Island Developing States (GCSDSIDS) in 1994 and, in 2009, a Specialized Workshop to discuss the potential of South-South Cooperation that was organized by the Task Team on South-South Cooperation (TT-SSC, 2011). Barbados will also host the fifteenth session of the United Nations Conference on Trade and Development (UNCTAD 15), which has been postponed until October 2021.<sup>10</sup>

Barbados has maintained long-standing bilateral relationships with countries in Latin America and the Caribbean, notably with Brazil, Cuba and the Bolivarian Republic of Venezuela,<sup>11</sup> in addition to its regional cooperation in the framework of CARICOM. In the case of Barbados-Cuba relations, as of 1993 bilateral agreements had been signed in a number of areas,<sup>12</sup> culminating in the establishment of a Barbados-Cuba Joint Commission in 1997. Cooperation in the areas of education, health and sports development was substantial. Barbados benefited from numerous Cuban university scholarship awards in medicine, dentistry and architecture starting in 1997. By 2006, 67 Barbadian nationals were studying in Cuba (Cotman, 2013, pp. 278–301).

The Bolivarian Republic of Venezuela has a long history of cooperation with Barbados. Barbados was also a beneficiary country of the Mexico-Venezuela Energy Cooperation Program for Central America and the Caribbean (San José Accord) concluded in 1980 with eleven countries in the Caribbean and Central America,<sup>13</sup> which involved the provision of petroleum on concessionary terms, trade promotion and access to development funding. The San José Accord for cooperation in energy operated until 1999, providing a leading example of Barbadian cooperation with both Venezuela and Mexico. Another key area of cooperation with the Bolivarian Republic of Venezuela has been in the culture and education sphere. The primary vehicle for this is the Venezuelan Institute for Culture and Cooperation, which has been operating in Barbados since 1977, delivering classes and diplomas in Spanish as a foreign language and promoting cultural exchanges between the two societies.<sup>14</sup>

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<sup>10</sup> See [online] <https://unctad.org/meeting/fifteenth-session-United-Nations-Conference-Trade-and-Development-UNCTAD-15>.

<sup>11</sup> In 1999, the official name of Venezuela was changed to the Bolivarian Republic of Venezuela. Accordingly, use of one or the other form depends on the year.

<sup>12</sup> Drugs Interdiction 1993, Mutual Visa Abolition 1996, Investments Protection 1996 (Cotman, 2013).

<sup>13</sup> Details of the San José Accord can be found in ECLAC (1994, pp. 17–19). For additional details, see Domínguez Martín (2015).

<sup>14</sup> See remarks by Álvaro Sánchez Cordero, Charge d' Affaires at the Embassy of the Bolivarian Republic of Venezuela in Barbados, 24 February 2020, during a graduation ceremony at the Venezuelan Institute for Culture and Cooperation [online] <https://www.youtube.com/watch?v=AKqKyjrtKIQ>.

Brazil and Barbados established diplomatic relations in 1971 and Brazil has maintained an embassy in Bridgetown since 1985, with Barbados opening its embassy in Brasilia in 2010. Cooperation arrangements prior to 2010 were primarily in the sphere of education, with Brazil extending 20 tertiary-level scholarships to Barbadian nationals between 2002 and 2013. In 2005, the Government of Brazil began to provide technical support for the teaching of Portuguese at the University of the West Indies Cave Hill Campus in Barbados.<sup>15</sup> Details of the expansion of Barbados-Brazil South-South cooperation as of 2010 are provided in the following section.

### **C. The management and oversight of South-South cooperation in Barbados: institutional arrangements for the initiation, implementation, management, monitoring and evaluation of South-South cooperation**

South-South cooperation falls primarily under the Ministry of Finance, Economic Affairs and Investment, which has a focal point for technical cooperation. The Planning Implementation Unit and the Statistical Department are also key agencies for managing national development, including the collection of data on external cooperation for development. The Ministry of Foreign Affairs and Foreign Trade<sup>16</sup> is the other key ministry, responsible for outreach and for coordinating South-South cooperation relationships. South-South cooperation mostly consists of government-to-government cooperation, which ensures that South-South projects respond to national priorities.

South-South cooperation is generally initiated and negotiated at the ministerial level, but departments and government agencies are responsible for implementing the actions agreed on. Efforts are made to ensure that experts and key officials are involved and consulted during the early stages of developing and approving projects.

The following principles and factors are taken into account and influence the policy framework when engaging in South-South cooperation actions:

- Political and diplomatic relations with the other participating countries.
- Similarities in socioeconomic conditions and development challenges among the partners.
- The former experience of cooperation with the other parties and track record in the particular action to be pursued.

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<sup>15</sup> See [online] [www.gov.br/mre/en/subjects/bilateral-relations/all-countries/barbados](http://www.gov.br/mre/en/subjects/bilateral-relations/all-countries/barbados).

<sup>16</sup> See [online] <https://www.foreign.gov.bb/>.

- Expected benefits in one or more of the following areas: financial transfers, transfers of knowledge, expertise or technology, improved social well-being.
- Alignment of the South-South cooperation projects with the country's development vision and national priorities.
- Ease of communication with partners, especially concerning language, culture and historical heritage.

South-South cooperation is valued for its potential to generate solutions to national problems through collaboration with countries that share similar perceptions about development obstacles. Such countries could provide best practices and procedures through knowledge transfer and mentoring.

As part of its bilateral, regional, intraregional and interregional cooperation initiatives, Barbados has benefited from the provision of financial aid and from non-monetary resources. However, in the words of one Barbadian researcher and technocrat, “there is no system in place that captures or measures technical cooperation or non-financial flows domestically” (Hunte, 2014).

## **D. Reporting of South-South cooperation and triangular cooperation**

Several types of South-South cooperation initiatives can be identified in Barbados. The country has been involved in South-South cooperation —both bilateral and multilateral— and triangular cooperation. Multilateral South-South cooperation has been conducted mostly with other CARICOM member States, the Organisation of Eastern Caribbean States (OECS) and members of ACS. Triangular cooperation has involved the participation of multilateral institutions such as UNDP, the United Nations Educational, Scientific and Cultural Organization (UNESCO), the Inter-American Institute for Cooperation on Agriculture (IICA)<sup>17</sup> and others.

Technical cooperation is the predominant form of South-South cooperation. Although there is a focal point for technical cooperation, due to the absence of a data collection and information system, the figures for technical cooperation are scattered and do not provide details. Therefore, it is not possible to determine which part of this technical cooperation can be classified as South-South cooperation.

<sup>17</sup> For example, in 2014, IICA and the Mexican Government jointly offered training for at least 150 agricultural producers and technical personnel from Antigua and Barbuda, the Bahamas, Barbados, Belize, Dominica, the Dominican Republic, Haiti, Grenada, Guyana, Jamaica, Saint Kitts and Nevis, Saint Lucia, Saint Vincent and the Grenadines, Suriname and Trinidad and Tobago in a capacity-building programme to promote agricultural development in the Caribbean (Costa Vazquez, 2016; IICA, 2014).

On the basis of information from several government departments, Hunte (2014) indicates that Barbados received an estimated US\$ 577,707 in technical cooperation flows between 2010 and 2012. One third of all non-financial aid flows went to the Ministry of Education, mostly in the form of scholarships and training. Approximately US\$ 19,200 was allocated to fund training in renewable energy development. Training in tourism policy and planning was estimated at US\$ 11,520 while training in agricultural studies accounted for approximately US\$ 11,504.

The Barbados Report for the Third International Conference on Small Island Developing States in 2014 placed emphasis on cooperation initiatives in Latin America and the Caribbean:

With respect to regional cooperation and diplomacy the Government has prioritised participation in Caribbean enterprises, strengthening of relationships with Latin America, completion of the delimitation of maritime boundaries, advancing the cause of the Caribbean Regional Fisheries Mechanism, bilateral arrangement with the Government of Trinidad and Tobago vis a vis fishing rights, access to natural gas and ferry transport services and deepening of relations with the Organisation of Eastern Caribbean States (OECS). (Government of Barbados, 2013, p. 64).

Beyond CARICOM and OECS, Barbados has maintained dynamic cooperation with Cuba. Besides the traditional cooperation in university education, in 1999 an agreement on sports cooperation was signed. Over the next twenty years, 172 Cuban coaches trained Barbadian athletes in a wide range of sporting disciplines, with impressive results.<sup>18</sup> In 2006, Barbados ratified the Trade and Economic Cooperation Agreement between the Caribbean Community (CARICOM) and the Government of the Republic of Cuba. Some challenges remain in this cooperation. There have been ongoing problems with the recognition of the certification of Cuban-trained doctors, despite periodic government commitments to resolve the difficulties (Springer, 2019; Marshall, 2011). Likewise, as with CARICOM-Cuba trade on the whole, bilateral trade flows have remained low. Both countries are seeking to expand their cooperation to new areas, including trade in Cuban medical services and pharmaceutical products, climate change adaptation and mitigation, natural disaster management and the blue economy as well as further cultural cooperation.

To support the country in its fight against COVID-19, in March 2020 a Cuban medical brigade composed of 101 medical professionals—95 women and 6 men—travelled to Barbados. The team was led by a female doctor (MINREX, 2020a).

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<sup>18</sup> Between 2000 and 2018, Barbadian athletes trained by Cuban specialists won 28 gold, 19 silver and 16 bronze medals (Ríos, 2018; Cubasi, 2019).

South-South cooperation with Brazil expanded after the conclusion of the Brazil-CARICOM Agreement in 2010, which was followed by three Complementary Agreements between Barbados and Brazil to cooperate on combating HIV-AIDS and on training in various areas of agricultural development and food security. 2010 also saw an air services agreement and the inauguration of direct air flights between São Paulo and Barbados (Brazilian Cooperation Agency, 2011; CARICOM Secretariat, 2010). Trade and technical cooperation initiatives continue to be explored, most recently in sugar production and energy co-generation (Rollock, 2018).

An example of Horizontal Multilateral Cooperation in which Barbados is involved, through the participation of the West Indies Central Sugar Cane Breeding Station in Barbados (WICSBS), is the ACP Sugar Research and Innovation Programme for agricultural research and innovation,

designed to enhance the capacity of the sugar industries in ACP countries to transition to and take advantage of opportunities in a deregulated sugar market. A total of €13 million, financed from the intra-ACP envelope of the ninth EDF cycle, was committed to the implementation of 13 research projects as well as to operate a programme management unit. ... The programme focuses on boosting research and innovation as well as sharing knowledge and information among the ACP sugar-producing countries, including research centres and partner factories. (OACPS/UNOSSC, n/d, p. 31).

Barbados has engaged in triangular cooperation also as a contributor, providing training and contributing to capacity-building. It has done so by hosting onsite workshops and providing vocational training and experts. One example is the SIDS-SIDS Green Economy Knowledge Transfer Platform based in Barbados, which is a product of the United Nations Partnership for Action on Green Economy (PAGE) resources for capacity-building among SIDS.<sup>19</sup>

Barbados prioritizes cooperation with other SIDS. The SIDS Technical Assistance Programme, launched in 1994 under the Barbados Plan of Action, is still considered to be relevant for the purpose of accessing South-South cooperation (Government of Barbados, 2013). One example of inter-regional SIDS cooperation was a project entitled “South-South cooperation between Pacific and Caribbean SIDS on climate change adaptation and disaster risk management” coordinated by the UNDP Pacific Centre, with support from the UNDP programme Caribbean Risk Management Initiative (UNDP/CRMI) between 2010 and 2012.<sup>20</sup> The

<sup>19</sup> Remarks by Jerome Xavier Walcott at the second High-level United Nations Conference on South-South Cooperation, Buenos Aires, 20 March 2019.

<sup>20</sup> See [online] <https://europa.eu/capacity4dev/intra-acp-agricultural-policy/documents/south-south-cooperation-between-pacific-and-caribbean-sids-climate-change-adaptation-and>.

project promoted cooperation among Caribbean and Pacific SIDS and involved regional institutions such as the Caribbean Disaster Emergency Management Agency (CDEMA), the Caribbean Community Climate Change Centre (CCCCC) and the University of the West Indies along with the Pacific Islands Applied Geoscience Commission, the South Pacific Regional Environment Programme (SPREP), the Pacific Community and the University of the South Pacific (USP).

Barbados's substantive contribution to the project was through the Caribbean Institute for Meteorology and Hydrology (CIMH) based on the island, which hosted four students from Samoa, Vanuatu, the Solomon Islands and Papua New Guinea for an eight-month mid-level meteorology technician training course. Barbados was one of the four Caribbean countries visited by national and regional representatives from the Pacific to learn disaster risk management practices. The project also has a triangular cooperation component since the largest share of the funding was provided by the UNDP-Japan Partnership Fund (Bernard and He, 2013).

Another example of SIDS cooperation involving Barbados was the project "Sandwatch: adapting to climate change and educating for sustainable development", in which Caribbean and Pacific SIDS have cooperated together with UNESCO. The project started in 1999 and continued for at least a decade. Through school programmes, it sought to develop awareness of the fragile nature of the marine and coastal environment and to modify attitudes and lifestyles in communities (United Nations, 2018; UNDP, 2010).

Sandwatch grew to become an international partnership between UNESCO, the Sandwatch Foundation, the University of Puerto Rico and NGOs, schools, local governments and ministries in 30 countries, half of which are SIDS. In 2014, the programme was recognized as one of the 25 most successful projects worldwide (The Sandwatch Foundation, n/d).

More recently, China has emerged as a major development partner in Latin America and the Caribbean, institutionalized with the Forum of China and the Community of Latin American and Caribbean States (CELAC) in 2015. During the past decade, Barbados and China have signed several cooperation agreements. Among these were an Economic and Trade Cooperation Agreement in 2011 that transferred 20 million renminbi (approximately US\$ 3 million) to Barbados for development projects, the memorandum of understanding (MOU) on cooperation in culture and sports in 2014, and the MOU to promote cooperation in education, science and technology also in 2014 (Embassy of the People's Republic of China in Barbados, 2019).

Within the framework of these agreements China has assisted with the construction of major government offices, sporting and conference facilities (Austin, 2017). In 2019, China and Barbados signed a new Agreement

on Economic and Technical Cooperation (Embassy of the People's Republic of China in Barbados, 2019). Cultural cooperation includes the establishment of a Confucius Institute at the University of the West Indies in Barbados in 2015, and the annual provision of scholarships for capacity-building in information technology, medicine, agriculture, renewable energy technology and other areas (Embassy of the People's Republic of China in Barbados, 2015). Most recently, within the framework of their shared interest in clean energy, Barbados purchased 33 electric passenger buses manufactured by Chinese company BYD that were delivered in September 2020 (Embassy of the People's Republic of China in Barbados, 2020a). China and Barbados have collaborated closely during the COVID-19 pandemic, starting with an exchange of letters between President Xi Jinping and Prime Minister Mia Mottley pledging solidarity in fighting the virus (Yan, 2020). China made three donations of medical equipment, including protective clothing, ventilators and thermometers to Barbados between March and September 2020, and it donated laptops to the Ministry of Education in June 2020 in support of the online education programme for schools (Embassy of the People's Republic of China in Barbados, 2020b). Finally, Barbados participated in a China-CELAC special video conference on 23 July 2020, co-chaired by Chinese Foreign Minister Wang Yi and Mexican Foreign Secretary Marcelo Ebrard. This meeting discussed the countries' ongoing collaboration in containing COVID-19 and made proposals about future cooperation aimed at post-pandemic economic and social recovery (Ministry of Foreign Affairs of the People's Republic of China, 2020).

In addition to its technical cooperation agreements with emerging economies like China and Brazil between 2010 and 2019, Barbados signed a MOU on technical cooperation with Morocco in 2018 (*The Daily Observer*, 2018). The current administration, led by Prime Minister Mottley, has pushed for more diplomatic and economic engagement with African countries, including Ghana and Kenya (Loop News, 2020b; GBN, 2019; IBW21, 2019; Williams, 2020; Government of Kenya, 2019; Pilé, 2019), both members of the OACPS and of the Commonwealth.

In spite of the various projects and partnerships developed as part of South-South cooperation relations (see table I.1), Barbados does not appear to have an established, uniform or comprehensive method to record, monitor or evaluate the outcomes and impacts of South-South cooperation, or to quantify its value.

**Table I.1**  
**South-South cooperation and triangular cooperation initiatives involving Barbados**

| Role of Barbados            | Partner/s   | Type of cooperation     | Details   | Value   |
|-----------------------------|---|-------------------------|---|---|
| Beneficiary                 | Brazil  | South-South cooperation | Provision of 20 university scholarships 2002–2013   | N/A   |
|                             |   |                         | Capacity-building in agricultural development/food security in 2011   | N/A   |
|                             |   |                         | Knowledge exchanges on combating HIV-AIDS in 2011   | N/A   |
|                             |   |                         | Capacity-building bio-mass fuel generation in 2011  | N/A   |
| Beneficiary                 | China   | South-South cooperation | Cultural exchange and sports. In 1980, China sent a table tennis coach to Barbados for a year's work.   | N/A   |
|                             |   |                         | China provides Government Scholarship to Barbadian students under the 1980 Cultural Agreement. In 2006, China offered eight scholarships to Barbadian students. | N/A   |
| Beneficiary                 | Cuba  | South-South cooperation | University scholarships in medicine, dentistry, agriculture 1997–2019   | N/A   |
|                             |   |                         | Athletics training 1999–2019  | N/A   |
| Beneficiary                 | Mexico/ Venezuela   | South-South cooperation | San José Accord 1980–1999, concessionary sales of petroleum products, access to development financing.  | N/A   |
| Beneficiary                 | Venezuela (Bol. Rep. of)  | South-South cooperation | Cultural cooperation, language training, 1977–2019  | N/A   |
| Beneficiary and contributor | ACP/European Union  | Triangular cooperation  | ACP-Sugar Research and Innovation Programme launched in 2013  | N/A   |
| Beneficiary and contributor | Caribbean Community Climate Change Centre (CCCCC) in collaboration with the Green Climate Fund (GCF), the Government of Barbados and the Barbados Water Authority (BWA) | Triangular cooperation  | The Water Sector Resilience Nexus for Sustainability in Barbados (WSRN S-Barbados) launched in 2019   | US\$ 45.2 million investment project. Funding includes US\$ 27.6 million in grants from the GCF and counterpart funding of US \$17.6 million from the Government of Barbados. |

Table I.1 (concluded)

| Role of Barbados     | Partner/s  | Type of cooperation     | Details   | Value   |
|----------------------|--|-------------------------|---|---|
| Beneficiary          | United Nations Industrial Development Organization (UNIDO) | South-South cooperation | Resource-efficient low-carbon and circular industrial partnership platform for catalysing eco-innovation and entrepreneurship in Barbados, announced in Samoa in 2014 | The initiative has given rise to the 2018-approved Global Environment Facility (GEF) "Strategic platform to promote sustainable energy technology innovation, industrial development and entrepreneurship in Barbados" to the amount of US\$ 14.67 million. |
| Borrower/beneficiary | Caribbean Development Bank (CDB)                           | South-South cooperation | Loans 2001–2013   | US\$ 219.3 million  |
| Borrower/beneficiary | Development Bank of Latin America (CAF)                    | South-South cooperation | Loans 2017  | US\$ 25 million   |

**Source:** Prepared by the authors, on the basis of Brazilian Cooperation Agency, "The technical cooperation between Brazil and CARICOM", 2011 [online] <http://www.abc.gov.br/imprensa/mostrarLayoutConteudo/73>; Embassy of the People's Republic of China in Barbados, "Summary of bilateral educational exchanges between China and Barbados", 2006 [online] <http://bb.china-embassy.org/eng/zbgxs/whjls/t268957>; Embassy of the People's Republic of China in Barbados, "Summary of bilateral sports exchanges between China and Barbados", 2006 [online] <http://bb.china-embassy.org/eng/zbgxs/whjls/t268956.htm>; J. W. Cotman, "The Havana consensus: Cuba's ties with five CARICOM States", *Coping with the Collapse of the Old Order: CARICOM's New External Agenda*, K. O. Hall and M. Chuck-A-Sang (eds.), Georgetown, The Integrationist, 2013; Radio Habana Cuba, "Deportes" [online] <http://www.radiohc.cu/noticias/deportes/>; Cubasi [online] <http://cubasi.cu/es/>; P. 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## **E. Main advances, challenges and lessons learned in Barbados**

### **1. Advances**

South-South cooperation in Barbados has advanced in the sectors of trade, health, education, the environment and climate change. Barbados has not only been a beneficiary but a contributor, particularly to multilateral South-South cooperation initiatives. There are various important areas in Barbados's development where South-South cooperation actors and institutions play a significant role, and this should increase in the future. One such example concerns development investment capital. Barbados faces major constraints in accessing development financing due to its high levels of public debt and ineligibility for concessionary funding. It is noteworthy that between 2001 and 2017 the country received loan and equity grant financing from the Caribbean Development Bank (CDB) in the amount of more than US\$ 433 million (UNDP, 2015, pp. 35–36; CDB, 2019) and also from the Development Bank of Latin America (CAF). Barbados became an Associate Member of CAF in 2015 and contracted two loans from that institution in 2017 in the amount of US\$ 25 million for tax system reform and the strengthening of its potable water infrastructure.<sup>21</sup>

### **2. Challenges**

Barbados still has to define South-South cooperation. The absence of quantification and assessment mechanisms for South-South cooperation prevents decision-makers and administrators as well as non-state actors from appreciating the actual and potential contribution of South-South cooperation to the country's development. This is counter-productive, especially in the current environment where South-South cooperation might mobilize more resources than those accessible elsewhere and might serve as a substantial complement to traditional North-South cooperation.

The construction of a system for the monitoring and evaluation of South-South cooperation faces various challenges. There is a need to update and reorganize the institutional infrastructure for comprehensive and more effective management of South-South cooperation. One question might be to identify the most appropriate location for such an institution. Various arrangements exist in different countries in Latin America and the Caribbean.<sup>22</sup> The structure of the cooperation system depends on the

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<sup>21</sup> See the Loan Agreement between CAF and the Government of Barbados [online] <https://www.babadosparliament.com/uploads/sittings/attachments/6fe8a5eb925409414a061745eb52510c.pdf> and CAF (n/d).

<sup>22</sup> In some countries, cooperation agencies are linked to ministries of foreign affairs or presidencies. Another possibility is to link cooperation governing bodies to ministries of planning, development or economy.

strategic interests and objectives of the entities concerned, the thinking of the national administration, and the State's development vision. It would appear that the current limitations are magnified by the absence of a reliable repository for the documents and records of the projects involving knowledge sharing and capacity-building developed in the framework of South-South cooperation.

There is a need to develop a clear methodology, normative framework and information system to support a South-South cooperation evaluation mechanism. To date, despite ongoing initiatives, there is a lack of a regional consensus in Latin America and the Caribbean on the methodologies, mechanisms and organizations that should quantify and evaluate South-South cooperation. This may present an additional obstacle for countries like Barbados searching to elaborate their own stronger, and more comprehensive South-South cooperation evaluation system. However, there are various good practice examples to study. For Barbados, it will be important to ensure that the system corresponds to national development priorities and reflects Barbados's capacities and resource availability, especially the budget available to invest in cooperation and the skills of the technical teams for international cooperation.

### **3. Lessons learned**

To measure South-South cooperation impacts, Barbadian actors (government, academia, civil society) need to update their own understanding of the nature of South-South cooperation. Their challenge is to develop a conceptual framework that will allow for a more comprehensive measurement of the value of technical assistance, knowledge sharing and capacity-building. It is accepted that the benefits associated with South-South cooperation cannot be encapsulated in a traditional cost-benefit analysis. A recent study by the Economic Commission for Latin America and the Caribbean (ECLAC) on new trends in international development cooperation proposes that South-South cooperation must go beyond traditional cooperation instruments to include innovative knowledge sharing tools, capacity-building and technology transfer. The global context demands new approaches to cooperation which would include South-South cooperation based on common interests, shared values and strong complementarities among the participants (ECLAC, 2018, pp. 33–34). Barbados is currently a co-chair of the new United Nations financing for development process which provides an opportunity for visibility and influence over the direction and content of the global discussions on this crucial theme. The China-CELAC Forum is another promising mechanism for such activities.

Having a standardized evaluation mechanism would be a useful tool to better inform decisions on South-South cooperation proposals and to monitor and evaluate the benefits and development impacts of South-South cooperation initiatives.

Another powerful argument for implementing a standardized evaluation mechanism is related to the current global and regional economic situation and low levels of economic growth. The volatility and uncertainty of the global economy indicate increasing economic difficulties for developing countries. Therefore, all efforts that might contribute to more efficient management of scarce resources are necessary. The availability of funds for South-South cooperation programmes are likely to be negatively impacted in the coming years and, in such a context, the implementation of a transparent and standardized evaluation mechanism would facilitate communication, design and programme execution in South countries.

There are many benefits to be derived from stronger South-South coordination in the country. It is a recommended best practice to ensure that a comprehensive evaluation process takes place before the approval of project proposals in order to avoid implementation issues at a later date.

It would be useful to create a specific body within the government structure to coordinate, gather and share data and information and monitor and evaluate the programmes developed as part of South-South cooperation in Barbados. This body should also facilitate communication and exchanges among other government institutions and academia, the private sector and civil society groupings willing to contribute to, and participate in, South-South cooperation initiatives.

There was no consensus about the form such a coordination unit would take, where it should operate from or its decision-making capacity. However, there is a need for a professional cadre devoted exclusively to the activity of South-South cooperation coordination and monitoring, with access to solid statistics and a comprehensive information system about South-South cooperation actions that involve Barbadian actors on different levels. Such a body would provide transparency about South-South cooperation decisions and projects and would be a mechanism for accountability and engagement in a more active and targeted search for South-South cooperation opportunities. Another benefit linked to the establishment of such a body would be the reduction of duplication and overlaps, which would also contribute to reducing administrative and transaction costs.

A communication strategy is also needed to inform the Barbadian population about South-South cooperation, its benefits and the country's role. South-South cooperation helps to broaden communication channels

and networks among the national administrations in Southern countries. The expansion of communication channels could also extend to other social actors and national communities if the platform existed. Barbados's current engagement with the SIDS-SIDS Green Economy Knowledge Transfer Platform may be a step in this direction.

The new context of South-South cooperation is characterized by the emergence of new partners, particularly China, Pacific SIDS and African countries. South-South cooperation has assumed a growing relevance in a context of diminishing availability of traditional development support. The pandemic also offers an opportunity to explore new forms of cooperation.

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## **Annex I.A1**

### **Methodology**

Barbados was selected as a leading member country of CARICOM with a consistent presence in the international space and a long history of good practice in maintaining high human development indices. It was also felt that the country possessed institutional capacity in the organization and conduct of its foreign relations and in its policy development and data collection processes. Barbados is classified as a high-income economy by the World Bank.

The research process involved four phases. First, preliminary scoping interviews were held with senior government officials in the ministries of foreign affairs, finance, and planning to ascertain the feasibility of undertaking the case study and their commitment to provide support for further field research. The second phase of the research involved extensive desk-based information searches on the historical emergence of South-South cooperation and the academic and policy debates that have influenced its evolution, as well as on the country's South-South cooperation profile. Data collection did not rely solely on desk-based research, but also on a combination of documentary research and interviews conducted with government officials in key institutions and agencies concerned with managing South-South cooperation in the country, as well as with academics, and representatives of Latin American countries who are leading South-South cooperation processes in Barbados. Civil servants from key international organizations that play supporting roles *vis-à-vis* South-South or triangular cooperation in the country were also interviewed. In the third phase of the research, ten days were spent between Barbados and Jamaica in order to conduct interviews and collect documentary evidence. Given the limited amount of country-specific South-South cooperation data available digitally, the fieldwork proved to be invaluable. The final phase of the research was devoted to analysing the material that had been collected.

## Chapter II

# **Experience with South-South cooperation: the case of Colombia**

*Lianne Guerra Rondón<sup>1</sup>*

### **Introduction**

At the second High-level United Nations Conference on South-South Cooperation (BAPA+40), held in Buenos Aires in March 2019, the participating countries used the outcome document to reaffirm the particularities that define and differentiate South-South cooperation from other forms of development cooperation and assistance. These include its grounding in values such as solidarity among the peoples of the South to contribute to national well-being, national and collective self-sufficiency and the attainment of the Sustainable Development Goals (SDGs) (United Nations, 2019).

As the global configuration of political and economic power has evolved, conditions have become more conducive to promoting South-South cooperation and achieving sustained economic development. Enhancing the capacity for South-South cooperation and its spheres of influence in the governance of assistance efforts remains a policy priority for development actors.

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Through a process of mutual feedback, changes in global sustainable development agendas have often led to updated national South-South cooperation agendas, most particularly among Latin American countries. With the experiences and expertise they have accumulated, those countries have played a crucial role in conceptualizing and promoting development from a Southern perspective. Given that the redefinition of the agendas, methodologies and actors of the international cooperation system remains ongoing and that international organizations have given responsibilities to developing countries, South-South cooperation has gained relevance at a time when official development assistance (ODA) is being reoriented to the detriment of middle-income countries. Although bilateral South-South cooperation disbursements are not changing greatly, the number of countries involved in those exchanges is increasing every year. However, there is a certain reluctance towards harmonizing South-South cooperation, especially as regards the standards of the Development Assistance Committee (DAC) of the Organisation for Economic Co-operation and Development (OECD), along with obvious management and design challenges. This raises a conceptual problem regarding how actors understand and assess their cooperation efforts with a view to the subsequent promotion of common frameworks for action.

As part of that search for common frameworks, the Economic Commission for Latin America and the Caribbean (ECLAC) has proposed using Systems of National Accounts (SNA) to determine the balance of payments and SNA aggregates generated by South-South cooperation activities.<sup>2</sup> This would allow a qualitative and quantitative analysis and breakdown of the relevant statistical information contained in the SNA—in terms of countries' flows of goods, services and transfers—and would largely overcome the tensions between the technical and the political sphere and the need for greater transparency in the countries' actions (ECLAC, 2008).

In recent years, the region has taken major steps towards creating and harmonizing indicators to measure the economic and social impact of South-South cooperation. The first meeting of the Presiding Officers of the Committee on South-South Cooperation, held in Lima on 27 November 2012 under the chairmanship of El Salvador, discussed the need to rethink the measurement goal and replace it with a more realistic alternative more in line with national capacities. In that context, the countries' representatives asked the Office of the ECLAC Executive Secretary to

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<sup>2</sup> The balance of payments covers three types of transfers: current international cooperation, which entails current transfers in cash or in kind between governments of different countries or between governments and international agencies; miscellaneous current transfers, in cash or in kind; and capital transfers. This statistical construct supports decision-making thanks to the clarity of a theoretical and methodological framework.

prepare a proposal for a general quantitative and qualitative measurement of South-South cooperation, based on the activities described in the *Report on South-South Cooperation in Ibero-America* of the Ibero-American General Secretariat (SEGIB) and including data for the Caribbean (ECLAC, 2013).

In the reports of later meetings, ECLAC has insisted on the need to consolidate and reach consensus on the various conceptual and theoretical aspects of quantifying the value of the components of South-South cooperation and the need to promote joint initiatives to further develop the work done by SEGIB and the Ibero-American Program for the Strengthening of South-South Cooperation (PIFCSS) in defining and constructing indicators to facilitate the socialization of information. Some countries have carried out voluntary systematization exercises in order to build historical baselines to reveal the changes occurring over time in the region.

To further those efforts, this chapter analyses the Colombian contribution to defining South-South cooperation through its gradual multilateral incorporation and the recognition of its expertise and experience in several sectors of key importance for the fulfilment of the 2030 Agenda for Sustainable Development. This involves examining the principles, instruments, modalities, resources and scope of the country's national development cooperation agenda and assistance strategies.

Like other Latin American countries, Colombia has adopted standards for multilateral cooperation. The country endorses the definition of South-South cooperation proposed by SEGIB (2014) and also recognizes the definition of cooperation accepted by DAC.<sup>3</sup> The Colombian authorities have clearly expressed their interest in contributing to the international aid effectiveness agenda by promoting good practices in the region (DNP, 2011, pp. 686 and 688).

Colombian cooperation subscribes to the principles of the Paris Statement and the Accra Declaration: horizontality, solidarity, mutual benefit, flexibility, respect for sovereignty, non-interference in the internal affairs of other countries, consensus and equity. In addition, the Presidential Agency of International Cooperation of Colombia (APC-Colombia) has stated that South-South cooperation responds to the needs of the nation's foreign policy, as it strengthens closer ties with regions of interest to the country. It also justifies its participation in South-South cooperation processes through its desire to contribute to other countries' development processes while enriching its own. Recently, the country has defined

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<sup>3</sup> SEGIB defines South-South cooperation as a "form of cooperation in which two developing countries exchange resources or experiences. No conditions are placed on those exchanges, and the dialogue takes place on equal terms. Costs are borne on a shared basis, although not necessarily in equal shares. Countries take the roles of provider (the one providing the main financial, technical and human resources) and recipient" (APC-Colombia, 2014).

South-South cooperation as any exchange of knowledge, technology or other resources between countries at similar levels of development, intended to contribute to their development processes (APC-Colombia, 2014).

Since South-South cooperation is considered a national priority and a favoured instrument of Colombian foreign policy, emphasis has been placed on the development of an approach to South-South cooperation based on the assessment of results according to the Quantification and Value Addition Model (MCAV) and respecting the basic principles of South-South cooperation. The institutional framework for South-South cooperation in the country has been actively developed, without this implying an uncritical endorsement of the assessment proposals put forward by OECD.

Colombia's international efforts for the assessment of South-South cooperation include its leadership, alongside Indonesia, of the DAC Task Team on South-South Cooperation (TT-SSC), the objective of which was to contribute to the debate on aid effectiveness by compiling successful cooperation experiences in various regions (López, 2014).<sup>4</sup> The stories and case studies led to the development of document with good practices and policy recommendations for the Fourth High-level Forum on Aid Effectiveness, held in Busan, Republic of Korea, in 2011. That event was a significant moment in development discussions in that it concluded with the signing of the Busan Partnership for Effective Development Co-operation, a more inclusive framework agreement that took into consideration new actors on the basis of "shared principles and differentiated commitments" (High Level Forum on Aid Effectiveness, 2011), and with the creation of the Global Partnership for Effective Development Cooperation, an inclusive multi-stakeholder partnership aimed at maximizing the effectiveness of all forms of development cooperation.

Unlike other groups, the Global Partnership brings together development actors from governments, multilateral and bilateral institutions, civil society, academia, parliaments, local governments, regional organizations, trade unions, the business sector and charitable organizations. Under the leadership of Colombia and building on the results of an earlier initiative by Mexico, Action Area 2.3 of the 2020–2022 Work Programme brings together partners from the global South to examine and test how the Global

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<sup>4</sup> The Task Team on South-South Cooperation (TT-SSC), sponsored by the Working Party on Aid Effectiveness (WP-EFF), brought together 41 developing countries. The experiences collected came from 19 regional and multilateral organizations, ten civil society organizations, three parliamentary bodies, eight academic institutions and think tanks, and ten DAC donors. The most recent activities carried out by TT-SSC include a discussion of the South-South cooperation glossary at a virtual forum in December 2014, a face-to-face workshop held in April 2015 in Bogotá and the resolution adopted by the ECLAC Statistical Conference of the Americas in November of that year.

Partnership's effectiveness principles could be applied and adapted to the context of South-South cooperation, in order to maximize its effectiveness and development impact for the achievement of the SDGs. The Colombian authorities believe that the guiding principles of South-South cooperation, as defined in the Buenos Aires Plan of Action (1978), are fully compatible with the Global Partnership's four principles of effectiveness. With the support of Switzerland, APC-Colombia will set up a dedicated team to liaise with each pioneering country to facilitate the data review and analysis process.

The 2013 Statistical Conference of the Americas (SCA) of ECLAC agreed to set up a task force composed of Argentina, the Bolivarian Republic of Venezuela, Brazil, Chile, Colombia, Mexico and Peru to develop and propose a methodological design and road map for measuring South-South cooperation (resolution 8(VII)). Among the agreements reached by the thirteenth meeting of the SCA Executive Committee (held in August 2014) was the approval of the work programme of the Colombia-led task force on measuring South-South cooperation. This group developed a glossary of statistical terms shared by the countries and identified possible areas for measuring South-South cooperation.

Colombia also promoted the creation of the Ibero-American Program for the Strengthening of South-South Cooperation (PIFCSS) at the first meeting of SEGIB National Coordinators and Heads of Cooperation and the negotiation of the Programme of Action of the Twenty-second Ibero-American Summit, held in Cádiz (Nivia-Ruiz, 2013, p. 113). In keeping with the multilateral mandates, a High-Level Inter-Institutional Commission for the Preparation and Effective Implementation of the 2030 Agenda<sup>5</sup> (institutionalized through Decree No. 280/2015) was created in 2015, which involved aligning the National Development Plan (NDP) with the SDGs at the national level (APC-Colombia, 2017a).

In the same vein, the country has participated in the High-level United Nations Conferences on South-South Cooperation and the high-level political forum on sustainable development, thereby contributing to the main debates on measuring South-South cooperation and its contribution to the SDGs.

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<sup>5</sup> In the 2030 Agenda for Sustainable Development, the United Nations Member States resolved that, under the auspices of the Economic and Social Council (ECOSOC) and during meetings of the High-level Political Forum, they would undertake voluntary reviews of their progress with the SDGs. Although these are public exercises and there is no provision for follow-up, Latin America has joined this initiative and more and more countries are submitting their voluntary national reviews (VNRs) and have established coordination mechanisms for the implementation of the 2030 Agenda. In the region, as of 2019, 27 of the 33 countries had created an institutional mechanism for implementing and monitoring the 2030 Agenda or had delegated these tasks to an existing institutional structure; 12 of these countries have established ad hoc inter-agency councils or entities to monitor the SDGs (Brazil, Chile, Colombia, Costa Rica, the Dominican Republic, El Salvador, Honduras, Jamaica, Mexico, Panama, Paraguay and Trinidad and Tobago). By 2020, 24 countries in the region had submitted at least one voluntary national review to the High-level Political Forum.

In 2019, APC-Colombia led other forums for examining the quantification and assessment of South-South cooperation, this time in the framework of the 2030 Agenda and on the occasion of the second High-level United Nations Conference on South-South Cooperation (BAPA+40).<sup>6</sup> Colombia spoke during the closing session, reaffirming some of the country's priorities and ensuring that the conference's final draft included references to measurements, methodologies and data collection to assess the quality, impact and results of South-South cooperation (Ruiz-Camacho and Nivia-Ruiz, 2020; APC-Colombia, 2019, p. 22).

The main achievements of Colombian South-South cooperation in recent years include the design of a new cooperation strategy with the private sector, the promotion of international cooperation at the regional level and the support received from the international community, mainly focused on peacebuilding in the country. These actions reflect Colombia's strategic alignment with international trends in South-South cooperation: the increased complexity of cooperation, the importance of State action, the growing roles played by private actors, the importance of results and increased awareness on the part of recipients (ECLAC, 2014, p. 12). If the impact of economic cycles on aid disbursements is added to these internal trends, together with intra- and interregional relations in developing countries that are leading to the creation of new financing frameworks and mechanisms, and processes of integration and partnership among countries, the complexity of South-South cooperation is undoubtedly increasing and, simultaneously, the challenges that come with it.

In short, the institutional framework for Colombian cooperation has evolved towards greater control over actions and projects and closer alignment with the national agenda and new global dynamics. The country has also innovated in terms of how it conceptualizes and appraises South-South cooperation. For example, the actors are referred to as "providing partners" and "recipient partners", marking a conceptual departure from the traditional nomenclature, which distinguished between "donors" and "recipients". As will be discussed below, South-South cooperation is seen as a knowledge exchange process that responds to common development challenges in the participating countries, thereby bolstering existing capacities and generating learning outcomes (APC-Colombia, 2017c, p. 42).

The historical background of South-South cooperation, its main institutions and its evolution are examined below.

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<sup>6</sup> Based on the recommendation regarding the need to advance with the formulation and implementation of projects that include technological exchanges made at BAPA+40, APC-Colombia included this issue as part of its annual goals with the aim of helping position Colombia as a provider and recipient of technology (APC-Colombia, 2020a, p. 14).

## A. Institutional framework for South-South cooperation in Colombia

Law No. 19 of 1958 created the National Council for Economic Policy and Planning. Under the direction of the President of the Republic, this body was charged with organizing the best use of the technical assistance provided by friendly countries and international entities (APC-Colombia, 2008, p. 19). Ten years later, the Special Directorate for International Technical Cooperation was created within the National Planning Department (DNP); it was responsible for coordinating cooperation at the national level, together with the Ministry of Foreign Affairs and a group charged with leading technical cooperation for development. Around the same time, Decree No. 2157/1982 created the Cooperation Fund for Central America and the Caribbean, the first account that made resources for technical development cooperation available from the national budget (Nivia-Ruiz, 2020).

In the 1990s, the country showed a keen interest in institutionalizing its international cooperation and —along with Mexico, Chile and Brazil— was seen as a “keystone country” in the region on account of its capacity for promoting cooperation. It was during this period that the National Council for International Cooperation and the Intersectoral International Cooperation Committee were established (Decree No. 1347 of 1995), attached to DNP and with participation by authorities from the Ministry of Foreign Affairs. This organization’s functions including guiding the demand for international cooperation and the actions implemented by the country (article 2).

In order to consolidate cooperation as an instrument to support development,<sup>7</sup> the creation of an international cooperation agency was proposed in 1995. It came into being a year later in the form of the Colombian Agency for International Cooperation (ACCI),<sup>8</sup> which was initially attached to the DNP but was reassigned to the Ministry of Foreign Affairs in 1999.<sup>9</sup> The agency was created with the aim of overcoming the problems of project dispersion and overlaps and ensuring that the actions taken responded to the country’s development priorities.

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<sup>7</sup> The proposal was made through the document “CONPES 2768 National International Cooperation Policy, Ministry of Foreign Affairs-DNP: DECTI of 22 March 1995”.

<sup>8</sup> ACCI was created by Law No. 318 of 1996 (20 September) in the context of reparations and restitution for victims of the Colombian armed conflict. The functions assigned to it included coordinating the National System for the Comprehensive Attention of the Population Displaced by Violence, attending to victims of violence and working to improve the living conditions of the country’s poorest and most vulnerable inhabitants (Decree No. 2467 of 2005, article 6).

<sup>9</sup> Further details on the competencies and functions of the Colombian cooperation agencies may be found in annex II.A1.

Unlike other countries in the global South where rules for received cooperation were established, Colombia was a pioneer in enacting a law to coordinate, promote and manage the resources received, as well as those obtained through bilateral and multilateral cooperation and debt cancellation operations. The International Assistance and Cooperation Fund (FOCAI) was created for the same purpose.<sup>10</sup> However, since Colombia has been considered a medium-developed country since 1990 and its importance as a recipient of ODA has therefore diminished, the organization of State institutions could be considered late (CEPEI, 2004).

The 1980s were crucial for Colombia in political terms, as it was gradually recognized that the violence in the country had objective and subjective internal causes and was not a post-Cold War conspiracy theory (González, 2014). From that moment on, the peace process and the problem of violence began to appear on presidential agendas. From the presidency of Belisario Betancur (1982–1986) to the investiture of Álvaro Uribe, successive presidents moved towards a more complex conception of peace, and this required the State to adopt a series of measures beginning with strengthening the country's institutions and political organization.

During that period, the focus of cooperation embraced foreign trade, soft loans and foreign investment, seeking a solution to the problems of drug trafficking, violence and poverty (DNP, 1996). Technical cooperation for development was perceived as a venue for historical ties, socioeconomic similarities and common problems. Thus, by virtue of its geographical position and its self-perception as a leader, the country focused its cooperation activities on Central America and the Spanish-speaking Caribbean.

The political elites' increased interest in cooperation led to the inclusion in 2003 of an explicit reference to international cooperation in the 2002–2006 National Development Plan, "Towards a Community State", in line with the international challenges outlined in the Millennium Declaration and the Millennium Development Goals (MDGs). In July 2005, a merger between the Colombian Agency for International Cooperation (ACCI) and the Social Solidarity Network led to the creation of the Presidential Agency for Social Action and International Cooperation (also known as *Acción Social*),<sup>11</sup> born of the need for a technical institution to promote cooperation in Colombia. From that year onwards, the country has earned international recognition for its ability to reinvent itself

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<sup>10</sup> Created by Law No. 318 of 1996. This fund responds to one of the governing principles of Colombian cooperation: that of shared costs, to jointly address development challenges and advance the common interests of the countries.

<sup>11</sup> By means of Decree No. 2467.

and emerge from the security crisis, which increased the demand for security cooperation and made the police and the military two of its main exportable resources (Tickner, 2016).

At the end of 2011, during the first presidency of Juan Manuel Santos, the Presidential Agency of International Cooperation of Colombia (APC-Colombia) was established as an entity attached to the Administrative Department of the Presidency of the Republic, replacing *Acción Social*.<sup>12</sup> The creation of APC-Colombia was seen as a sign of the State's willingness to strengthen the institutional framework for international cooperation (Bergamaschi, Tickner and Durán, 2017).

During the years when the regulatory framework was still evolving, oversight of the cooperation agencies was assigned to a number of different bodies —the office of the President, the Ministry of Foreign Affairs and the Ministry of the Interior— with varying degrees of budgetary<sup>13</sup> and executive independence.<sup>14</sup> At present, the lead institutions for international cooperation are the Ministry of Foreign Affairs and APC-Colombia (see box II.1).

Among the first measures adopted to implement the legal framework for international cooperation was agreement No. 4 of the International Assistance and Cooperation Fund (FOCAI), as amended in 2005 (by agreement No. 19) and in 2012. The latest version of the agreement sets criteria for allocating resources for the execution of non-reimbursable technical and financial cooperation and international assistance actions, evidencing how both discourse and practice have adapted to changing international cooperation scenarios. Since 2006, there has been a reorientation of cooperation through actions in line with the needs of recipient countries (Nivia-Ruiz and Ramos, 2015) and the recognition of Colombia's role as a provider of South-South cooperation.

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<sup>12</sup> APC-Colombia was created by Decree No. 4152 of 2011.

<sup>13</sup> Presidents Álvaro Uribe and Juan Manuel Santos granted the cooperation agency independent legal status, administrative autonomy and its own assets, but the former did not give it financial autonomy. During the Uribe administration, it was ruled that reimbursable cooperation would be treated as loans and would therefore be subject to the regulations of the Ministry of Finance and Public Credit and the External and Internal Credit Division of DNP; non-reimbursable funding, in contrast, was to be channelled and accounted for by ACCI. From the start of the Santos administrations, APC-Colombia enjoyed a different legal status and greater financial independence to act.

<sup>14</sup> Hall (2016, p. 40) explains this behaviour through the paradox of plasticity: the more attention is paid to the factors that shape institutions, the more the power of institutions to shape policy is questioned. This implies that in addition to questioning the institutional capacity of the organizations they inherit, new political actors assuming power question the legitimacy of those institutions to reproduce State power and define new foreign policy actions.

## Box II.1

**Colombia: current South-South cooperation regulations and operations**


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**Decree No. 4152 of 3 November 2011**, creating the Presidential Agency of International Cooperation of Colombia (APC-Colombia).

**Agreement No. 4 of 7 March 2012**, adopting the regulations of the International Assistance and Cooperation Fund (FOCAI).

**Agreement No. 8 of 1 October 2012**, clarifying article 5 of agreement No. 4 of 2012 on the financing of non-reimbursable technical and financial cooperation programmes, projects and activities.

**Decree No. 869 of 25 May 2016**, establishing and specifying the functions of the Ministry of Foreign Affairs in the management of international cooperation.

**2019–2022 National Strategy for International Cooperation (ENCI)**

**Presidential directive No. 06 of 17 June 2020** on the 2019–2022 National Strategy for International Cooperation and guidelines for targeting non-reimbursable international technical and financial cooperation received by Colombia.

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**Source:** Prepared by the author.

The transformation of the institutional cooperation framework is apparent in the 2012 update of the regulations, which responded to the need to develop an approach with a greater international scope and impact.<sup>15</sup> The last directive reflects a return to the role of recipient, which is understandable since Colombia is one of the countries of Latin America and the Caribbean that receives the most non-reimbursable cooperation.

Among the analytical elements worthy of note are the international cooperation strategies developed by the governments to cover three-year international planning periods. While other countries include cooperation planning in their multi-year development plans, Colombia draws up independent strategies, once again demonstrating the importance given to this issue. The first strategy focused on internal development, as its objective was to plan Colombia's relationship with its ODA donor partners and to attract foreign direct investment to address economic and social problems.

Between 1999 and 2002, Colombia's poverty rates remained stagnant. According to ECLAC (2004, p. 48), the weak growth in gross domestic product (GDP) in 2002 was due to internal factors. This bolstered the interest in attracting reimbursable and non-reimbursable funds to cover the economic costs of development. The text of the 2003–2006 National Development Plan speaks of Colombia's role as a recipient of cooperation and the law legalizing that text includes cooperation in section 7, on foreign policy.<sup>16</sup>

<sup>15</sup> During the 2002–2014 period, five decrees on the functions of the Colombian Agency for International Cooperation (ACCI) were adopted.

<sup>16</sup> Law No. 812 of 2003.

During that period, the Presidential Agency for Social Action and International Cooperation signed international cooperation agreements worth US\$ 362 million, earmarked for the areas of reconciliation and governance (54%), the world drug problem and the environment (33%) and the Millennium Development Goals (MDGs) (13%) (Presidency of the Republic of Colombia, 2009).

In addition to these thematic areas, another aim during the 2007–2010 period was to strengthen Colombia's presence in the international context in general and in Latin America in particular. The 2010–2014 National Development Plan clearly states that:

International cooperation will continue to be consolidated as an instrument of foreign policy that helps strengthen the strategies for achieving democratic prosperity and constructing a new Colombia (DNP, 2011, p. 687).

Security, human rights and democratic governance are the main sectors on which Colombian international cooperation focuses. In the 2014–2018 National Development Plan, the first to cover four years of planning, the political objectives of international cooperation and the country's resulting profile were more ambitious, aiming to strengthen ties with neighbouring countries and expand insertion strategies in the Asia-Pacific region. The goals include a considerable number of bilateral diplomatic activities: 389 visits, 12 countries benefiting from security cooperation and 50 countries benefiting from South-South cooperation (DNP, 2011, p. 690).

The 2018–2022 National Development Plan, "Pact for Colombia, Pact for Equity", proposes the creation of the National System for International Cooperation (SNCI) as a strategy for guiding and coordinating actors to ensure the alignment and effectiveness of international cooperation.<sup>17</sup> The country's dual status as a provider and recipient of international cooperation is recognized in this period's cooperation strategy, which frames it as a challenge in terms of alignment and interconnection with national development actions and priorities and with Colombia's efforts to position itself internationally through a rigorous and successful supply of technical cooperation. Accordingly, it sets itself the goal of quantifying the value added by the cooperation that the country receives and provides.

One of the main objectives of the 2012–2014 National Strategy for International Cooperation is to maintain the international recognition of South-South and triangular cooperation through a range of activities, including traditional relations with Latin America and the Caribbean and initiatives with Asia, Africa and Eurasia. In 2014, South-South cooperation

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<sup>17</sup> Law No. 1955 of 25 May 2019.

relations with Central America and the Caribbean were consolidated, and relations with countries in South-East Asia, Africa and Eurasia were diversified (APC-Colombia, 2016; Nivia-Ruiz and Ramos, 2015). Once again, these processes were aligned with the strategies set out in the National Development Plan: working for peace, promoting equitable growth to combat poverty and reduce inequality, improving the quality of education, fostering productivity and boosting competitiveness, enhancing social mobility, promoting green growth and macroeconomic consistency (García, 2015) (see table II.1).

**Table II.1**  
**Colombia: international cooperation strategies**

| Strategies  | Scope             |
|---|-------------------|
| National Strategy for International Cooperation 2003–2006 | Internal          |
| National Strategy for International Cooperation 2007–2010 | Internal-External |
| National Strategy for International Cooperation 2012–2014 | Internal-External |
| Comprehensive Security Cooperation Strategy               | Internal-External |
| International Cooperation Road Map 2015–2018              | Internal-External |
| National Strategy for International Cooperation 2019–2022 | Internal-External |

**Source:** Prepared by the author.

One notable element of the 2019–2022 National Strategy for International Cooperation is the intersection of interests between the aid effectiveness agenda and a planning document for the 2030 Agenda and the SDGs. Like no other, this strategy underscores the importance of collaboration between national agencies, local authorities, cooperation partners, the private sector and civil society and recognizes them all as stakeholders in cooperation.

In general, since 2010, a balance has been struck between the planning of cooperation received and cooperation provided, and the strengthening of South-South cooperation and regional and multilateral partnerships are now included as objectives.

## **B. Assessment methodology and implementation**

Colombia only began to systematize the amounts of its cooperation in the 1980s. The first database with information on programmes and projects compiled figures for cooperation received (Acción Social, 2005).<sup>18</sup> Thereafter, more frequent data began to be generated on ODA and, to a lesser extent, on South-South cooperation projects. A series of institutional

<sup>18</sup> It is estimated that between 1982 and 1996, the country received US\$ 836.991 billion in bilateral cooperation and US\$ 393.797 billion in multilateral cooperation, accounting for 68.8% and 31.2% of the total, respectively (DNP, 1996).

reforms were initiated in 2002 to provide reliable and stable information to increase the effectiveness of public policies (Castro, 2006, p. 47). Following that, the System for Monitoring and Evaluating Cooperation Projects was implemented and, subsequently, the Official Development Assistance Information System (SIAOD) was created, which centralized the registration of cooperation received and disaggregated the data by the beneficiary municipalities and areas (Nivia-Ruiz, 2020).

While Acción Social had a cooperation map that made it possible to display the activities carried out through South-South cooperation programmes, APC-Colombia conducts its monitoring of South-South and triangular cooperation by means of a monitoring matrix and an initiative programming and implementation table that has been extended to countries, regions, beneficiaries and sectors (Nivia-Ruiz, 2020, p. 59). The launch of the 2015–2018 Road Map for International Cooperation in 2015 marked the beginning of the current assessment method for Colombia's South-South cooperation. This, together with the great challenge of positioning the country as a regional cooperation leader, has encouraged thought on the best methods and tools to consolidate the South-South cooperation offered.

To address the need to develop methodologies suited to the national reality of South-South cooperation and the diversity of the partners involved (Escallón, 2019), a value-addition model was proposed to assess the contribution to sustainable development, the protection of global public goods and the country's positioning as a cooperation provider.

In 2017, APC-Colombia published the *Colombia SSC Toolbox Manual*, which sets out the steps required to fill out the South-South cooperation project formulation form.<sup>19</sup> This form uses a two-component approach called the Quantification and Value Addition Model (MCAV). The first component involves the quantification of direct and indirect costs associated with activity implementation, while the second examines the value added by project contributions (APC-Colombia, 2017c, p. 3).<sup>20</sup>

What is normally referred to as the “international cooperation project cycle” is called “knowledge-sharing stages” in Colombia.<sup>21</sup> This change implies that in any South-South cooperation project, there is

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<sup>19</sup> The text “Guidelines for Technical Cooperation among Developing Countries”, prepared by Acción Social in 2006 to promote better initiative coordination, could be considered a predecessor of this document. It defined two fundamental issues: the desire to group actions together, and a strategy with a demand-driven approach.

<sup>20</sup> This methodology was inspired by the guide *The Art of Knowledge Exchange*, developed by the World Bank using a results-based approach.

<sup>21</sup> The knowledge-sharing tools are: expert visits, workshops, field visits, internships, webinars, exploratory visits, forums, debates or dialogues, learning paths, courses, conferences, high-level missions, communities of practice and knowledge fairs. In 2016–2017, expert visits accounted for the highest percentage (17%) of the tools used, according to data from APC-Colombia (2014).

reciprocity in terms of the knowledge that the actors share. This process consists of nine stages:

- (i) Demand for South-South cooperation.
- (ii) Formalization through diplomatic channels and the Ministry of Foreign Affairs.
- (iii) Feasibility analysis with technical partners from the public and private sectors.
- (iv) Technical and financial validation to determine the expectations and scope of the exchange.
- (v) Joint formulation of the South-South cooperation project.
- (vi) Structuring of South-South cooperation exchange activities, including technical and operational preparations.
- (vii) Implementation of activities, which may include the transfer of technical and financial resources.
- (viii) Quarterly follow-up and monitoring of activities.
- (ix) Conclusion and socialization of results through the Final Project Report tool, which seeks to encourage feedback and the possibility of replicating successful initiatives (APC-Colombia, 2017c, pp. 10 and 11).

As regards the quantitative aspect of cooperation, the direct costs associated with South-South and triangular cooperation activities are calculated with the following formula:

$$\text{Amount} = (\text{Ba} + \text{Gv} + \text{Lg}) + (\text{n} * \text{Sd} * \text{d} + 2)$$

Where the direct costs are:

- Ba= Air tickets (including insurance, if applicable)
- Gv= Travelling expenses
- Lg= Logistics

And the indirect costs:

- n= Number of professionals
- Sm= Monthly salary
- Sd= Daily salary [Sm/20]
- d+2= Days of activity [+2 days for technical preparation]

In the second component, which covers the value added, projects are categorized in accordance with the following criteria: generation of

new knowledge that is applicable in one area of development or another; creation or strengthening of synergies; generation of identification and visibility; promotion of participation by women and ethnic groups; and, finally, specific contributions to raising the profile of practices associated with the SDGs (Escallón, 2019; APC-Colombia, 2017c, p. 17). These categories are, in turn, assessed in economic and qualitative terms. A value from 0 to 3 is assigned for the final assessment according to the expected scope of the indicator (“knows, takes ownership, applies, replicates”) in order to create a pentagonal scatter plot mapping the main benefits of the project.

This model for assessing South-South and triangular cooperation greatly enhances the national strategy and has a great potential for export to other developing countries. It involves two different dimensions — development actions and expenditure— that present different challenges in terms of data collection, analysis and systematization. Its component categories do not pose major difficulties for collecting the necessary information before and after the project. The main novelty lies in its combination of quantitative and qualitative elements, the latter in the form of added value, which to some extent undermines the South’s discourse on the non-quantifiable contributions of South-South cooperation. This methodology allows for a harmonization exercise that brings together the multiple public, private and multilateral actors involved in implementing international cooperation. The systematization exercise is simplified and contributes directly to the preparation of APC-Colombia’s management reports. Undoubtedly, one of the main achievements of this methodology is its progress towards more transparent and better aligned management systems. In recent years, the South-South cooperation toolbox has been accompanied by a manual for the formulation of international cooperation projects that incorporates the MCAV methodology and the ECLAC logical framework methodology (APC-Colombia, 2020b).

In addition, the component for assessing South-South and triangular cooperation recognizes that the potential of South-South cooperation lies in the strength of the partnerships it forges and its ability to promote knowledge sharing and to showcase achievements. Although the MCAV was first applied in 2017, its results first emerged in 2019, following the completion of the first South-South cooperation projects that used it to determine results. With the compilation of those data, the full cycle of South-South cooperation provided by Colombia can be analysed (Escallón, 2019).

The last issue to be analysed in this section is the visibility of cooperation results. The APC-Colombia *2018 Management Report* follows up on progress with the implementation of the Integrated Management System (SGI), based on the Cíclope system technological platform. According to article three of its regulatory decree, the system consists

of a set of management elements that make up an operational tool for improving stakeholders' expectations of information availability.<sup>22</sup> These are not isolated efforts within in the region; instead, they are part of a series of initiatives undertaken by Latin American countries to centralize project data and create South-South cooperation indicators.

Thanks to this system, the *2020 Management Report* indicates the total non-reimbursable international cooperation received by the country and the contributions of the international private sector. Particularly notable in this most recent report is the level of disaggregation of the information provided and the follow-up by overarching goals of the activities and projects in which the country participated as a cooperation provider and recipient, in a context marked by the impact of the COVID-19 pandemic crisis.

In short, the changes in the institutional framework for cooperation are intended to ensure greater transparency and joint participation by development actors, from the demand stage to the collaborative construction of results and experiences that can be replicated in other countries. However, this process still needs the unified variables that would enable the alignment of publications about South-South cooperation (Nivia-Ruiz, 2020; Escallón, 2019).

### C. Colombian South-South cooperation in figures

The information systematization process in Colombia has advanced in concert with the development of its cooperation institutions and information management systems. Today, this undertaking remains a challenge for many of the region's cooperation agencies and organizations charged with recording, systematizing, creating data collection methods and the subsequent publications. In recent years, Colombia has revealed a significant capacity for harmonizing its cooperation strategies and operational framework, while seeking to align the cooperation resources received with national development priorities.

During the 2015–2018 period, for example, the quantification of cooperation was divided into five categories: bilateral cooperation, regional cooperation, international assistance, *Saber Hacer Colombia* and special programmes (APC-Colombia, 2018).<sup>23</sup> In general, the country accepts international classifications that distinguish between technical and scientific cooperation, categories that include projects in the areas of citizen

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<sup>22</sup> Created by Resolution No. 422 of 10 September 2015.

<sup>23</sup> *Saber Hacer Colombia* is a methodology that draws on territorial and national experiences that have a direct impact on SDG indicators. Those experiences are made available to development partners through South-South, triangular and Colombia-Colombia (in-country exchanges, known as "Col-Col") cooperation projects and programmes.

security, the fight against drugs and transnational organized crime; the modernization of the State; the environment; education, culture and art; and productive development. Since 2010, the impact and international profile of financial cooperation has been expanded through the consolidation of joint regional agendas, also known as “regional cooperation strategies”. This information is systematized by five regions: Africa, South-East Asia, Caribbean Basin, Eurasia and Mesoamerica<sup>24</sup> (see table II.2).

**Table II.2**  
**Mechanisms of Colombian South-South cooperation**

| Mechanisms  |  |
|---|--|
| Regional cooperation projects                       | Colombian Cooperation Strategy with the Caribbean Basin<br>Regional Cooperation Programme with Mesoamerica<br>South-South Cooperation Strategy with countries of South-East Asia<br>Colombian Cooperation Strategy with Africa<br>Strategy for International Cooperation in Comprehensive Security<br>Eurasia Strategy   |
| Mechanisms for regional cooperation and integration | Promotion of South-South cooperation and trade through regional and inter-regional organizations, for example: Organization of American States (OAS), Ibero-American General Secretariat (SEGIB), Pacific Alliance, Forum for East Asia-Latin America Cooperation (FEALAC), Association of Caribbean States (ACS), Caribbean Community (CARICOM), Forum for the Progress and Integration of South America (PROSUR), <sup>a</sup> Andean Community (CAN), Community of Latin American and Caribbean States (CELAC), Central American Integration System (SICA), others. |
| Strategic alliances                                 | Partnerships with the public and private sectors to ensure robust, sustainable projects.   |
| Bilateral programmes                                | Joint technical and scientific cooperation committees, neighbourhood committees, and cultural, educational and sports committees   |

**Source:** Prepared by the author, on the basis of Presidential Agency of International Cooperation (APC-Colombia) and B. Hernández-Umaña, “Cooperación Sur-Sur de Colombia”, *La cooperación Sur-Sur en América Latina y el Caribe: balance de una década (2008-2018)*, T. Ojeda and E. Echart (eds.), Buenos Aires, Latin American Social Sciences Council (CLACSO), 2019.

<sup>a</sup> On 22 March 2019, a new regional body was created: the Forum for the Progress and Development of South America (PROSUR). The Declaration of Santiago, the founding document of PROSUR, was signed by the presidents of Argentina, Brazil, Chile, Colombia, Ecuador, Paraguay and Peru, joined by the Ambassador of Guyana in Chile, George Talbot. PROSUR is a new forum for integration that aspires to efficiency and a simpler, less costly institutional framework, with clearer operating rules and an agile decision-making mechanism. The new organization seeks to further integration and coordinated action in the areas of infrastructure, energy, health, defence, security and crime, and natural disaster prevention and management, reproducing almost entirely the lines of work of the Union of South American Nations (UNASUR) (Guerra Rondón, 2019). In December 2020, President Iván Duque of Colombia assumed the *pro tempore* presidency of this organization.

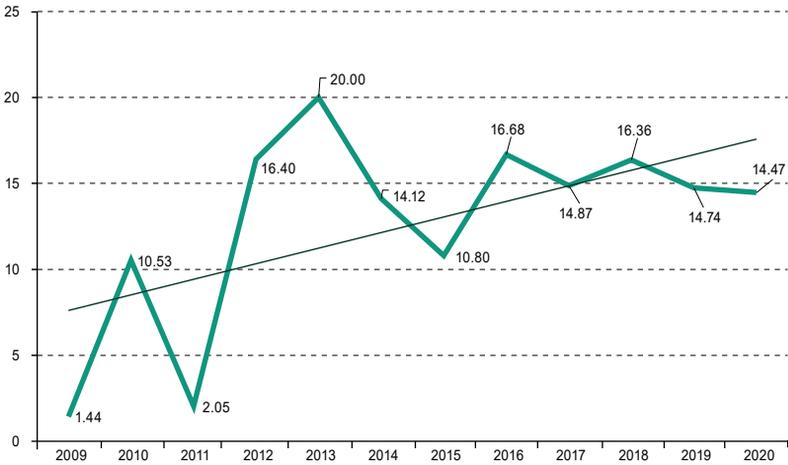
In Colombia, bilateral South-South cooperation programmes and projects are referred to as “joint commissions”. This mechanism derives from the bilateral framework cooperation agreements the country has

<sup>24</sup> Colombia uses the term Mesoamerica —a cultural and anthropological concept and not a geographical one— to refer to the Central American isthmus. The Mesoamerica strategy aims to contribute to the economic and social development of the countries in this area and has a portfolio of projects in such thematic areas as peace-building and rural development.

signed with different countries, mainly in Latin America. South-South cooperation programmes agreed upon within the framework of the joint cooperation commissions have a term of two years. The methodology for assessing South-South cooperation presented in the previous section was designed for the preparation and execution of projects of this kind.

In the 2010–2013 period, a total of 4,500 people benefited in social development issues thanks to Colombian technical cooperation, and 3,100 officials were trained in around 220 institutions for a total of 136 cooperation initiatives. Between 2010 and 2015 —the period when Colombia made the greatest efforts to systematize its cooperation— 29,603 people were trained in police and military matters in 63 countries (Tickner, 2016, p. 19). According to data from the Ministry of Defence, between 2010 and 2017, 36,309 people from 73 countries received trained in the area of security (Nivia-Ruiz, 2020, p. 60). The cooperation actions have been accompanied by an exponential increase in FOCAI resources since 2011, with the largest disbursement, worth 20 billion pesos, executed in 2013. Those figures remained relatively stable from 2016 to 2020 (see figure II.1).

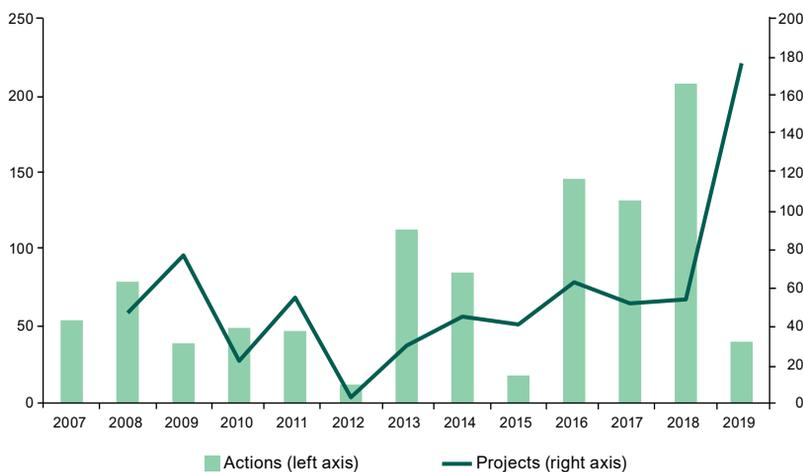
**Figure II.1**  
**Colombia: South-South cooperation resources executed, International Cooperation and Assistance Fund (FOCAI), 2009–2020**  
*(Billions of Colombian pesos)*



**Source:** Presidential Agency of International Cooperation (APC-Colombia), *Informe de Gestión 2019, Bogotá, 2019* [online] <https://www.apccolombia.gov.co/sites/default/files/2020-04/Informe-de-Gestion-2019-Version-2.pdf>; Informe de Gestión de Cooperación Internacional en Colombia, Bogotá, 2012 [online] [https://www.apccolombia.gov.co/sites/default/files/archivos\\_usuario/2016/apc-colombia-informe-gestion-2012\\_0.pdf](https://www.apccolombia.gov.co/sites/default/files/archivos_usuario/2016/apc-colombia-informe-gestion-2012_0.pdf); F. Nivia-Ruiz, “La medición de la cooperación Sur-Sur colombiana a cuarenta años del PABA: una propuesta de convergencia entre cuantificación y agregación de valor”, *OAS/S*, vol. 31, Bogotá, Universidad Externado de Colombia, 2020; F. Nivia-Ruiz and I. Ramos, “Balance de la cooperación internacional al desarrollo ofrecida y recibida por Colombia: coherencia entre metas y logros del cuatrienio 2010-2014”, *Revista Internacional de Cooperación y Desarrollo*, vol. 2, No. 1, Cartagena, Latin American School for Cooperation and Development, 2015.

Between 2003 and 2006, 735 cooperation projects were carried out (Acción Social, 2007), involving a total of US\$ 560 million (Tickner, 2016, p. 10). Between 2007 and 2018, the number of actions increased while the number of projects remained stable (see figure II.2).

**Figure II.2**  
**Colombia: South-South cooperation actions and projects implemented**  
**in Latin America, 2007–2019**  
*(Number of actions and projects)*



**Source:** Prepared by the author, on the basis of Ibero-American General Secretariat (SEGIB) and Presidential Agency of International Cooperation (APC-Colombia).

**Note:** The 2019 figures were provided by APC-Colombia authorities at a meeting with ECLAC (5 January 2021).

As the institutional framework for South-South cooperation develops, projects become more complex and set a greater number of objectives, which could lead to an increase in the resources needed for implementation. In contrast, actions are more focused and can even be palliative, and they have a smaller economic dimension. This is the case with humanitarian aid in disaster situations, a form of assistance into which Colombia has ventured. In 2019 that trend again reverted, and the number of projects exceeded the number of actions. In any case, since 2012 there has been a trend towards growth or stability in the number of projects carried out.

Colombian disaster response planning dates back to 1985 and the eruption of the Nevado del Ruiz volcano. The National System for Disaster Prevention and Response was created to deal with the damage caused by this natural phenomenon.<sup>25</sup> This initiative was followed by a gradual institutionalization of the sector, through the adoption of the

<sup>25</sup> Decree No. 919 of 1989.

National Plan for Disaster Prevention and Response in the late 1990s and the signing in 2005 of the Hyogo Framework for Action at the First World Conference on Disaster Reduction in Japan. To comply with the conference's mandates, the country adopted a national risk management policy, and prevention and resilience were incorporated into development plans (UNGRD, 2014). In Colombia, international standards applicable to this area have been included in political, legal and technical instruments. Law No. 1523 of 2012 is the instrument that has made the most progress towards a comprehensive understanding of the sector, by evolving from a regime based on attending to emergencies to one geared towards risk reduction. Thanks to that institutional framework, the country carries out cooperation actions in Latin America with transfers of knowledge and not only of resources.

During the 2010–2014 period, Latin America was the main recipient of Colombian humanitarian aid. In total, the country disbursed US\$ 7.7 million, which was channelled either directly or through international agencies such as the United Nations Office for the Coordination of Humanitarian Affairs (OCHA), the United Nations Development Programme (UNDP), the Office of the United Nations High Commissioner for Refugees (UNHCR) and the World Bank (Nivia-Ruiz and Ramos, 2015; SEGIB, 2011).<sup>26</sup> After the 2010 earthquake in Haiti, the country sent 3,202 tons of food supplies and 372,552 litres of drinking water, and it also participated in search and rescue efforts and preparing risk assessments. The humanitarian assistance missions deployed in response to the earthquakes in Chile and Haiti were conducted as part of longer operations and more complex coordination models, involving the overseas mobilization of personnel, equipment and humanitarian aid to support the immediate response and stabilization phases of the affected countries (Nivia-Ruiz and Ramos, 2015, p. 114).<sup>27</sup> In 2018, FOCAI resources were used to assist following the eruption of the Fuego volcano in Guatemala, the earthquake and tsunami in Indonesia, the earthquake in Yemen and the drought in Honduras. In 2017, funds were channelled into the hurricane emergency in the Caribbean (Silva, 2018). The budget allocated by FOCAI for humanitarian assistance in 2019 was 1.515 billion pesos. Those resources were used to provide international assistance to Guatemala and El Salvador through the Central Emergency Response Fund (CERF), and to Honduras (APC-Colombia, 2019).

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<sup>26</sup> In 2018, the Government of Iván Duque, through the Presidential Agency of International Cooperation (APC-Colombia), provided UNHCR and the International Organization for Migration (IOM) with more than US\$ 215,000 for humanitarian assistance to help migrants from the Bolivarian Republic of Venezuela headed for Ecuador and Peru (APC-Colombia, 2018).

<sup>27</sup> Under the Comprehensive Security Cooperation Strategy, Colombia trained Haiti in drug control techniques at ports and airports (Ministry of Foreign Affairs, 2021).

Despite the large number of countries receiving bilateral and triangular technical cooperation projects, Colombian cooperation focuses on the countries of Central America and the Caribbean Basin, where there are serious problems of drug-related violence and crime. The main recipients of security actions are Ecuador, Guatemala, Honduras and Mexico, which received between 85% (2013) and 45% (2015) of the cooperation carried out between 2010 and 2015 (Tickner, 2016, p. 19). Those countries were selected because of their high levels of drug production and trafficking.<sup>28</sup>

Table II.3 lists all the countries with which Colombia has cooperated as of 2020.

**Table II.3**  
**Recipients of Colombian bilateral South-South cooperation up to 2020**

|                                 |  |
|---------------------------------|--|
| Latin America and the Caribbean | Argentina, Brazil, Chile, Costa Rica, Cuba, Dominican Republic, Ecuador, El Salvador, Guatemala, Haiti, Honduras, Jamaica, Mexico, Panama, Paraguay, Peru, Plurinational State of Bolivia and Uruguay. |
| Africa                          | Algeria, Benin, Botswana, Democratic Republic of the Congo, Egypt, Gabon, Ghana, Kenya, Namibia, Nigeria, Morocco, Mozambique, Senegal, South Africa and United Republic of Tanzania.                  |
| Asia                            | Bhutan, Cambodia, China, India, Indonesia, Lao People's Democratic Republic, Malaysia, Myanmar, Pakistan, Philippines, Singapore, Thailand and Viet Nam.   |
| Eurasia                         | Azerbaijan, Kazakhstan, Russian Federation and Turkey.   |

**Source:** Prepared by the author, on the basis of F. Nivia-Ruiz and I. Ramos, "Balance de la cooperación internacional al desarrollo ofrecida y recibida por Colombia: coherencia entre metas y logros del cuatrienio 2010-2014", *Revista Internacional de Cooperación y Desarrollo*, vol. 2, No. 1, Cartagena, Latin American School for Cooperation and Development, 2015; Presidential Agency of International Cooperation (APC-Colombia), *Informe de Gestión 2020*, Bogotá, 2020 [online] <https://www.apccolombia.gov.co/sites/default/files/2021-02/Informe%20Gestio%CC%81n%202020%20.pdf>; *Herramientas para la formulación de proyectos de cooperación internacional*, Bogotá, 2020 [online] <https://www.apccolombia.gov.co/sites/default/files/2020-10/herramienta%20formulacio%CC%81nproyectos.pdf>; *Informe de Gestión 2019*, Bogotá, 2019 [online] <https://www.apccolombia.gov.co/sites/default/files/2020-04/Informe-de-Gestion-2019-Version-2.pdf>; Presidency of the Republic of Colombia (2014).

Colombia has signed South-South Cooperation Framework Agreements with the following partner countries: Argentina, Barbados, Brazil, Chile, China, Costa Rica, Cuba, the Dominican Republic, Ecuador, Egypt, El Salvador, Guatemala, Guyana, Honduras, India, Indonesia, Jamaica,

<sup>28</sup> In recent years, Colombia has shown great capacity for addressing the drug problem. Between 1997 and 2010, illicit opium poppy cultivation was reduced from 6,584 hectares to 341 hectares. A similar situation can be observed with regard to illicit coca bush cultivation, which decreased from 144,800 ha in 2001 to 57,000 ha in 2010. The number of seizures rose from 38,876 in 2010 to 41,291 in 2011, and the amount seized increased for the third consecutive year, from 209 tons in 2009 to 255 tons in 2010 and 321 tons in 2011. These figures need to be interpreted with caution, however, as it is not clear whether they are due to increased production or to the actions of law enforcement (UNODC, 2013, p. 52). What is undeniable, however, is that a large number of agencies of the public administration, including the Ministry of Health and Social Protection, have been mobilized by addressing the problem as a whole and not just as a security issue. Actions of this kind accredit the country's efforts in the fight against drug trafficking in Central America.

Malaysia, Mexico, Morocco, Panama, Paraguay, Peru, the Plurinational State of Bolivia and Uruguay (Hernández-Umaña, 2019, p. 79).

The visibility that Colombia seeks to give to South-South cooperation is a part of the broader strategic objectives it pursues. These include targeting and bolstering the international cooperation it receives, sharing valuable knowledge with developing countries and consolidating an effective cooperation agency. Setting clearer benchmarks allows the country to target measurable goals. For example, according to the 2015–2018 Road Map for International Cooperation, Colombia’s objectives for that three-year period included assisting and providing reparations for 100,000 victims of the armed conflict, improving the incomes of 15,000 rural families living in poverty, contributing to the design and implementation of management plans of at least three forest reserves and 30 national parks, and sharing valuable knowledge with 40 partner countries. According to APC-Colombia, these objectives were met more than adequately: between 2012 and 2017, the country registered relations with more than 74 beneficiary countries of Colombian South-South cooperation and more than 1,000 activities (APC-Colombia, 2018).

These internal and external goals indicate a form of cooperation framed by a high-profile foreign policy that does not neglect its primary objective of improving the living conditions of Colombian society.

## **D. Lessons learned**

In 1999, Colombia aroused the international community’s interest with the peace diplomacy conducted through the Pastrana Government’s peace talks. On average, the country’s ODA resources rose from US\$ 100 million to US\$ 500 million a year between 1999 and 2002 and, despite the cessation of the talks in February 2002, the main donors continued to allocate cooperation resources to the country, which for some years was the region’s leading recipient of ODA (García, 2015). In 2017 alone, the country received more than US\$ 400 million in international resources from multi-donor post-conflict funds (APC-Colombia, 2017b, p. 11). The State’s gradual recovery of its territory led to Colombia being considered a “success story” for the resolution of the armed conflict and its problems of violence. Those factors legitimized its cooperation work and, as a result, it assumed a dual role as both a recipient and a donor of international cooperation, which is in itself a challenge.

Ten years of systematization of cooperation have consolidated the direction and goals that the country sought to achieve with the South-South cooperation it offers. Thus, the features that distinguish it from traditional North-South cooperation in terms of ownership and mutual accountability

include its flexible scheduling, the adaptation of knowledge or experience to the local context and methodological innovations. Colombia has been able to incorporate these elements into the different stages of its projects through the joint definition of needs and objectives with a focus on demand, political and technical partnerships in project phases and the organization of capacity-building workshops and exercises. These lessons have been drawn mainly from the implementation of joint commissions, which have enabled all the actors to understand and take responsibility for the planning, monitoring and evaluation processes.

Future improvements to this methodology should involve its adaptation—in accordance with the response capacity of the demand partners—to the model proposed by Colombia and the adjustment of its methods for securing public and private international cooperation investment as progress is made in forecasting expenditure.

One significant element that stands out in recent years is the gradual inclusion of public and private actors, regional administrations and representatives of civil society in the production of knowledge. The Colombia-Colombia (Col-Col) intra-national cooperation scheme is an example of this exchange of experiences at the national level, which has succeeded in interconnecting local territorial actors, national entities and traditional development cooperation partners.<sup>29</sup> Indeed, it is the result of promoting traditional technical know-how, which seeks to inspire other projects and actors in triangular and regional actions while remaining aligned with the cooperation strategies and national development plans.

Over the past four years, the production and systematization of data have increased and they are beginning to display greater internal consistency. This allows for the consolidation of the data collection and presentation methods. However, the existence of various sources providing data that do not necessarily agree with each other gives rise to methodological difficulties (Nivia-Ruiz, 2020). While the diversity of Colombian practices and modalities enriches the body of South-South cooperation, comparing Colombian figures with those of other developing countries could be detrimental to combined results.

The Colombian authorities have responded to the call made by the United Nations on the importance of knowledge sharing for capacity

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<sup>29</sup> The internal development strategy promoted by President Álvaro Uribe and the call for ODA and foreign direct investment to resolve the Colombian armed conflict could be seen as the antecedents of Col-Col cooperation. For Uribe, building Colombians' trust in their country rested on three pillars: security, investment promotion and social policy. Security and investment promotion were the means, while social policy was the end and legitimizing element of the first two (Uribe, 2014, quoted by Angoso, 2014, p. 39). President Juan Manuel Santos subsequently included this internal strategy in the Col-Col cooperation method, dedicated to the development of cooperation projects in the country with private and triangular funding (Guerra Rondón, 2020).

building (United Nations, 2018). The methodology applied in the country is indicative of this internalization of the rules and of the building of a consensus with regard to South-South learning and the coordination of policies to accelerate sustainable development. The proposed methodology for assessing South-South cooperation is promising for use in other countries, at least in the Latin American context.

APC-Colombia has highlighted the need to focus on a demand-driven approach, with proper planning and a defined road map. This is intended to guide initiatives with broader and more comprehensive objectives, both at the national level (Col-Col cooperation) and in the joint construction of lines of action with partner countries (Hernández-Umaña, 2019).

The strengthening of relations between APC-Colombia and ECLAC will enable the dissemination of this methodology through regional training workshops, as an experience worthy of replication in other countries. This will entail the critical adoption of the Colombian proposal and taking from it the elements that can best contribute to national processes for assessing South-South cooperation. Greater harmonization among the different agencies and bodies in charge of South-South cooperation in other countries will make the accumulation of national knowledge and practices possible and facilitate the definition of synergies and future cooperation projects.

In line with the BAPA+40 goals of improving coordination mechanisms, disseminating information and assessing South-South cooperation, Colombia's contributions offer an opportunity for progress in that direction and towards stronger regional alliances committed to the achievement of the SDGs. However, the Colombian experience is still incipient, a characteristic that —far from invalidating its contributions— should facilitate dialogue and the adaptation of its methodology to capacities of its demand partners to produce indicators and variables. It is clear that there is an interest in increasing the technical and methodological rigour of South-South cooperation. The 2015–2018 Road Map for International Cooperation is an example of technical work carried out to greatly reduce the negative externalities and risk factors that must be considered when implementing South-South cooperation initiatives (Nivia-Ruiz, 2020).

One of the main ambitions of South-South cooperation management is the fulfilment of the five principles of aid effectiveness set out in the Paris Statement. The country has a tradition of adhering to good practices, and South-South cooperation is not disinterested in the search for exemplary behaviour. This political will, together with the consideration of South-South cooperation as a fundamental pillar of foreign policy, makes it possible to expect positive results in the near future. Among

the proposal's challenges is the level of ownership that the institutions can attain in order to leave behind other practices and move towards the consolidation of this tool. Similarly, as suggested by Nivia-Ruiz (2020), the success of this methodology requires that partner countries find sufficient incentives to share quantitative and qualitative financial information on the implementation of joint South-South cooperation initiatives.

Another challenge or innovation for the future could be to make the Cíclope system available to a wider public, so that development actors and academics can use its data for current rather than retrospective analyses after the calendar year of cooperation as determined by APC-Colombia. This system could also be harmonized with the systematization initiatives of the Ibero-American Program for the Strengthening of South-South Cooperation (PIFCSS) and of SEGIB in Latin America and the Caribbean.

In a national context of peacebuilding and transition towards greater territorial control, Colombia's dual role as a South-South cooperation donor and ODA recipient will continue to be present in the day-to-day formulation and management of public policies and foreign policy. Along that path, South-South cooperation will remain a valuable venue for achieving the SDGs as a country and as a region.

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## Annex II.A1

**Table II.A1.1**  
**Functions and duties of Colombian cooperation agencies**

| Agencies  | Functions and duties  |
|---|---|
| Colombian Agency for International Cooperation (ACCI)                               | <ul style="list-style-type: none"> <li>– Coordinate and structure official international cooperation intended for public entities, with the exception of military cooperation.</li> <li>– Enter into contracts and agreements for international cooperation to take place.</li> <li>– Support centralized and decentralized national institutions.</li> <li>– Support territorial authorities.</li> <li>– Coordinate requests for international cooperation made by non-governmental organizations (NGOs) and private organizations requiring endorsements or “no objection” certificates.</li> <li>– Support the creation and strengthening of international cooperation offices.</li> <li>– Establish contracts with potential providers and recipients of international cooperation.</li> <li>– Organize preparatory meetings and joint commissions on international cooperation in coordination with the Ministry of Foreign Affairs.</li> <li>– Support the Ministry of Foreign Affairs in negotiations or international framework treaties for international cooperation.</li> <li>– Study international cooperation projects presented by government entities.</li> <li>– Manage and follow up on international cooperation projects.</li> <li>– Prepare horizontal or triangular cooperation projects together with the Ministry of Foreign Affairs.</li> <li>– Channel all the international cooperation projects presented by public entities.</li> </ul> |
| Presidential Agency for Social Action and International Cooperation (Acción Social) | <ul style="list-style-type: none"> <li>– Coordinate the development of the cooperation policy set by the Ministry of Foreign Affairs.</li> <li>– Manage and promote non-reimbursable technical and financial cooperation.</li> <li>– Manage international cooperation resources, plans, programmes and projects.</li> <li>– Promote improved living conditions for the poorest and most vulnerable segments of the population.</li> <li>– Manage reimbursable cooperation (concessional credits) treated as loans in conjunction with the National Planning Department (DNP) and the Ministry of Finance and Public Credit.</li> <li>– Recommend general policies and procedures for receiving and delivering donations, and oversee their compliance.</li> <li>– Provide humanitarian assistance to the displaced population included in the Single Displaced Population Register.</li> <li>– Administer the International Assistance and Cooperation Fund (FOCAI).</li> </ul>   |
| Presidential Agency of International Cooperation (APC-Colombia)                     | <ul style="list-style-type: none"> <li>– Contribute to the positioning of cooperation issues in international forums and negotiations.</li> <li>– Manage and promote the non-reimbursable technical and financial cooperation received and provided by the country.</li> <li>– Execute supply and demand strategies for international cooperation.</li> <li>– Lead inter-agency coordination mechanisms.</li> <li>– Produce, process and share information and knowledge for analysis.</li> <li>– Administer FOCAI.</li> <li>– Manage the resources, plans, programmes and projects that use non-reimbursable technical and financial cooperation or private cooperation.</li> <li>– Identify opportunities for North-South, South-South and Col-Col cooperation that complement the technical and financial instruments at the national and local levels for the pursuit of the Sustainable Development Goals (SDGs).</li> <li>– Promote the participation of overseas private sectors in different initiatives and projects to strengthen the implementation of the SDGs.</li> <li>– Document good practices of <i>Saber Hacer Colombia</i> local sustainable development that are related to the 2030 Agenda for Sustainable Development.</li> </ul>   |

**Source:** Prepared by the author, on the basis of F. Nivia-Ruiz, “La medición de la cooperación Sur-Sur colombiana a cuarenta años del PABA: una propuesta de convergencia entre cuantificación y agregación de valor”, *OAS/S*, vol. 31, Bogotá, Universidad Externado de Colombia, 2020; Ministry of Justice and Law, “Decreto 4152 de 2011”, *Diario Oficial*, No. 48242, Bogotá, 3 November 2011; Presidential Agency for Social Action and International Cooperation (Acción Social), “Resolución 7044 de 2010”, *Diario Oficial*, No. 47831, Bogotá, 13 September 2010; “Resolución 2847 de 2007”, *Diario Oficial*, No. 46720, Bogotá, 14 August 2007; “Resolución 1246 de 2005”, *Diario Oficial*, No. 46.140, Bogotá, 3 January 2005; Presidential Agency of International Cooperation (APC-Colombia), *La cooperación internacional y su régimen jurídico en Colombia*, Bogotá, 2008 [online] [https://www.apccolombia.gov.co/sites/default/files/archivos\\_usuario/publicaciones/lacooperacioninternacionalsuregimenjuridicoencolombia.pdf](https://www.apccolombia.gov.co/sites/default/files/archivos_usuario/publicaciones/lacooperacioninternacionalsuregimenjuridicoencolombia.pdf).

## Chapter III

# **Experience with South-South cooperation: the case of Cuba**

*Lianne Guerra Rondón<sup>1</sup>*

## **Introduction**

South-South cooperation has risen in prominence over the past decade thanks to the emerging cooperation powers of the global South. This type of cooperation has been a subject of discussion at several major United Nations conferences and in other forums, such as the Group of 77 and China and the Group of 20 (United Nations, 2016, p. 6). In 2019, the results of the second High-level United Nations Conference on South-South Cooperation (BAPA+40) marked the start of a period of transformation in South-South and triangular cooperation. The progress made by many developing countries is contributing to a realignment of the principles and rules of international cooperation. The outcome document of the BAPA+40 Conference highlighted the immense potential of these cooperation mechanisms to contribute to the achievement of the 2030 Agenda for Sustainable Development (United Nations, 2019, para. 2). At the event, developing nations were encouraged to develop country-led systems for data collection, quality assessment, monitoring and evaluation,

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methodologies and statistics, in keeping with the principles of South-South cooperation (United Nations, 2019, para. 8). This chapter, which aims to analyse and evaluate the process through which Cuban South-South cooperation has been built in both regulations and discourse, aims to respond to that mandate.

Cuba boasts one of the longest histories of South-South cooperation in Latin America and the Caribbean. The country is in particular demand for its knowledge and expertise in the areas of health, education and disaster prevention. Like other middle-income countries, it plays the dual role of provider and recipient of official development assistance (ODA); in practice this means it accepts the principles and methodologies of traditional cooperation while promoting a South-South cooperation framework that claims to be based on notions of solidarity, non-interference in internal affairs, internationalism and anti-imperialism. This chapter describes the normative framework of Cuban South-South cooperation from a historical perspective in order to advance an understanding of the Cuban narrative and its deep roots in the principles of the global South.

## **A. Normative and institutional framework for Cuban South-South cooperation**

South-South cooperation is based on an ideological and political narrative that has not only permeated the normative and institutional frameworks of the main bodies responsible for international governance but has also gradually shaped an institutional regime of the South (Domínguez-Martín, Lo Brutto and Surasky, 2019, p. 9). Analysing Cuban cooperation requires awareness of one principle that characterizes the State's discourse in this area: solidarity. The Cuban Constitution of 1976 refers to the solidarity-based nature of international cooperation as an instrument for collaboration with countries that —mainly, but not exclusively— share its political ideology.<sup>2</sup> The inclusion of this principle is consistent with the first internationalist missions conducted between 1960 and 1980 in countries engaged in decolonization processes in Central America, Africa and Asia. This period was significant in reaffirming the anti-imperialist and internationalist principles that laid the groundwork for the Cuban discourse on collaboration. Solidarity here represents a

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<sup>2</sup> Almost all official Cuban documents uses the term “collaboration” to refer to cooperation. Between 1960 and 1975, cooperation actions were referred to as “solidarity”; then, in the 1980–2009 period, the term “collaboration” began to be used interchangeably with solidarity. The most recent document on the country's economic, social and foreign policy uses “cooperation”, as does the Decree Law that currently regulates it. The term South-South cooperation came into formal and official use in 2004, following the adoption of United Nations General Assembly resolution 58/220.

normative and methodological principle that, as Sandbrook (2014, p. 54) suggests, functions as both an end and a means to achieve goals that could not be attained individually.

During that period, the solidarity-based discourse was promoted on the international stage by the rise of the Movement of Non-Aligned Countries (NAM) and by notions of support for the oppressed. In early 1966, the First Solidarity Conference of the Peoples of Africa, Asia and Latin America, attended by 82 countries, was held in Havana. The event's final declaration showcased Cuban leadership in decolonization processes and in the defence of the principle of self-determination. The Cuban discourse consolidated optimism about the power of strategic alliances in the South and the importance of cooperative relations.<sup>3</sup> This laid the groundwork for the institutionalization of the South-South cooperation the country offers.

International cooperation has historically been managed by the Cuban State. In the 1970s it was institutionalized through the State Committee for Economic Co-operation, an institution within the framework of the Council for Mutual Economic Assistance (CMEA) led by the Union of Soviet Socialist Republics. In the 1990s, by means of agreement No. 2822, the Ministry of Foreign Investment and Economic Cooperation (MINVEC) was created, which was charged with regulating and controlling the technical assistance offered by the country and participating in the management of the personnel deployed abroad. In 2009, Decree Law No. 264 established the Ministry of Foreign Trade and Foreign Investment (MINCEX), merging the Ministry of Foreign Trade and MINVEC. Although its name did not include the term collaboration, the new ministry continued to manage all such activities. This is confirmed by a story in the pro-government newspaper *Juventud Rebelde* of the same year.

Resolution No. 15 of 2006 was the first to establish rules for the economic collaboration received by Cuba, the mechanisms for cooperation, donations and soft loans, and the types of assistance and development projects covered. Assistance projects deal with the delivery of supplies of different kinds, including food, medicines and other goods, while development projects are those that generate a sustainable economic, social and scientific impact over time for the benefit of the population.

Unlike the cooperation Cuba provides, which is governed by the guiding principles of South-South cooperation, a number of distinctive features define the institutional framework for the cooperation it receives. Its stated principles are the following:

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<sup>3</sup> In 2006, Havana hosted the Fourteenth NAM Summit, which advocated for a South-South cooperation model that would improve the countries' economic, commercial and political position.

- Non-interference in the country's internal affairs.
- Aims primarily at the priorities established by the government and under no circumstances favours sectors of the population on the basis of ethnicity, religion or nationality.
- Disallows the creation of systems for social services or for the distribution of resources received through economic collaboration.
- Cuba is responsible for paying the professional fees of the local personnel that projects require.
- Resources are restricted to the objectives for which the project was originally approved.
- Cuban society's various development players (State and social organizations, associations, foundations and civil society) may only pursue collaborative projects that are in line with their corporate purpose.

In December 2018, the Council of State and the National Assembly of People's Power approved the text of an International Cooperation Act; this was legislated two years later by Decree Law No. 16 of 24 September 2020.<sup>4</sup> This legislation establishes for the first time the legal framework for the international cooperation provided and received by Cuba, as well as for its control and oversight. Interestingly, the country aligned itself with international cooperation categories and clearly defined the forms of intervention and the areas in which it could be pursued. In comparison to resolution No. 15, the act devotes 17 articles to describing the cooperation offered and the actors and regulatory bodies involved.

Article 19 of this act reiterates the role of the MINCEX Directorate of Collaboration as the body in charge of keeping statistics and receiving proposals from countries wishing to collaborate with the Government of Cuba. In coordination with the Ministry of Foreign Affairs (MINREX), the agencies of the Central Administration of the State, the senior business management organizations and other national entities, it ensures the cooperation actions that Cuba offers. The Ministry receives requests for cooperation and, according to their nature, channels them to the relevant ministries. If the cooperation project includes economic benefits, it must be authorized by the Ministry of Economic Affairs and Planning, the Ministry of the Revolutionary Armed Forces and, if it involves the relevant areas, the Ministry of Science, Technology and Environment.

The cooperation provided by Cuba is offered in areas in which the country has acquired technical expertise, mainly in the social sector. For health-related cooperation, the Directorate of Collaboration has a register of doctors who are trained and authorized to carry out international

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<sup>4</sup> Published in the *Official Gazette of the Republic of Cuba*, No. 85 of 1 December 2020.

missions and to participate in collaboration agreements, regardless of the mechanism agreed on with the receiving partner. In turn, the Ministry of Public Health (MINSAP) has a Directorate of Collaboration, which also manages data on cooperation received, and a Central Medical Cooperation Unit, which is in charge of cooperation offered.

It is significant that the institutional framework for Cuban cooperation has evolved over time: from a centralized system managed by a single entity to one in which a greater number of agencies are involved. However, since they all belong to the State, it would be inappropriate to speak of the existence of decentralized cooperation in the country.<sup>5</sup> The reasons behind these institutional changes differed from one era to the next. In 2011, for example, the company *Comercializadora de Servicios Médicos Cubanos, S.A.* was created; attached to the MINSAP Central Medical Cooperation Unit, it is, like MINCEX, accredited to receive requests for health cooperation projects and receive monetary compensation.<sup>6</sup> The company is authorized to participate in international fairs and to carry out commercial missions in conjunction with the Chamber of Commerce of Cuba. It processes orders for which payment is received, but not the humanitarian aid actions or bilateral agreements that Cuba signs up for with other countries. This has a significant impact on the discourse surrounding cooperation offers. In addition to its disaggregated management model, cooperation entails economic variables, which implies adapting the cooperation narrative to national economic conditions and the international context.<sup>7</sup> As indicated in article 14 of the International Cooperation Act, cooperation must be “sustainable by considering, as far as possible, the compensation of at least the costs” (Ministry of Justice, 2020).

This type of decision responds to a cost-benefit formula that also has an impact on the actors with whom Cuba chooses to work, i.e. those with the best payment solvency that will allow the reimbursement of costs (Huish, 2014, p. 188).<sup>8</sup> These decisions are in line with the evolution

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<sup>5</sup> Although article 43.1 of Decree Law No. 16 recognizes the existence of social or mass organizations and other forms of non-profit Cuban association, they do not participate in the cooperation supply and, for them to receive international cooperation, the endorsement of State agencies must be obtained.

<sup>6</sup> The Central Medical Cooperation Unit was created in 1984 by resolution No. 154-84 and resolution No. 183 with the objective of entering agreements for direct medical assistance, advisory and consultancy services, training for human resources overseas and the training of Cuban personnel.

<sup>7</sup> The Government of Cuba's Economic and Social Policy Guidelines (2011) propose considering the compensation, at least, of the costs of the collaboration that Cuba provides.

<sup>8</sup> The country has signed cooperation agreements with three Persian Gulf countries: Saudi Arabia, Kuwait and Qatar. The Agreement between the Government of the State of Qatar and the Government of Cuba for Provision of Medical Services was signed on 22 April 2008 and came into force in 2009. In 2010, the Government of Cuba signed a memorandum of understanding with Saudi Arabia on consultations in the political and bilateral arenas (26 January) and an agreement covering a loan and a project (26 April). That same year, Cuba signed a trade agreement (17 July) and a memorandum of understanding on the conduct of bilateral consultations (17 July) with Kuwait (MINREX, 2010, 2009 and 2008).

of cooperation discourse at the multilateral level and are more consistent with principle of mutual benefit enshrined in South-South cooperation. For those Caribbean countries unable to cover the expenses, triangular cooperation is a way to cover cooperation costs and avoid generating losses for the Government of Cuba, thus demonstrating the operational nature of cooperation: not-for-profit, but not generating expenses. Even so, as noted by Domínguez-Martín, Lo Brutto and Surasky (2019) and Domínguez-Martín (2015), reimbursable cooperation represents the trend for financing the new development agenda in most developing countries. This trend reached its peak in the 1970s, with the agenda of the new international economic order and the Charter of Economic Rights and Duties of States.

In terms of its operational conception, preparing the country's cooperation policy is the responsibility of the Council of State, MINREX, the Communist Party of Cuba (PCC) and MINCEX. It is then presented in the foreign policy section of the national development plans as part of the socialist planning of the economy. Historically, the reports of the PCC Congresses have included references to international cooperation and its importance in vindicating the position of the South in the structure of the international system (see box III.1).<sup>9</sup>

#### Box III.1

##### International cooperation in Cuban political documents

- 
- First Congress of the Communist Party of Cuba: International Policy Resolutions (1975).
  - Second Congress of the Communist Party of Cuba: International Policy Resolutions (1980).
  - Third Congress of the Communist Party of Cuba: International Policy Resolutions (1986).
  - Fourth Congress of the Communist Party of Cuba: Foreign Policy Resolution (1991).
  - Fifth Congress of the Communist Party of Cuba: the Party of Unity, Democracy and Human Rights that we Defend (1997).
  - Sixth Congress of the Communist Party of Cuba: Economic and Social Policy Guidelines (2011).
  - Seventh Congress of the Communist Party of Cuba: Economic and Social Policy Guidelines of the Party and the Revolution for the 2016–2021 Period (2016).
  - Eighth Congress of the Communist Party of Cuba: Updating the Conceptualization of the Cuban Economic and Social Model of Socialist Development (2021).
- 

**Source:** Prepared by the author.

<sup>9</sup> In the first two reports (1975 and 1980), Cuba sought to influence multilateral organizations by working for balance in the international system and requesting that the United Nations support NAM. In later reports (1986 and 1991), the country showcased its interventions before the United Nations in defence of the Palestinian cause. In the subsequent Congress reports up to the most recent, which was held on 16 to 19 April 2021, Cuba has invariably emphasized the principle of self-determination and its wish to promote integration.

In points 82 to 85 of the Economic and Social Policy Guidelines of the Party and the Revolution for the 2016–2021 period, Cuba reaffirmed its commitment to international cooperation and defined the areas of its technical and economic management to be strengthened, in order to adapt it to the country's current conditions (Ojeda, 2019). Cuba sees international cooperation as an “essential component of the Revolution's foreign policy,” grounded on the values of solidarity and humanism. It is “carried out without conditions, with unrestricted respect for States' sovereignty, national laws, culture, religion and self-determination, rejecting its use as a political instrument for interfering in their internal affairs” (*Granma*, 2017).

*Granma*, the State's official newspaper, has said:

Different definitions of development cooperation are available in the existing literature and none are valid for all times and places. It is therefore common for each country to focus its definition on its international relations interests at the bilateral and multilateral levels with both public and private actors. In the case of Cuba, international cooperation is an essential component of the Revolution's foreign policy and it is based on the values of solidarity and humanism that our society defends (*Granma*, 2017).

Cuba does not have its own definition of technical cooperation or South-South cooperation, and neither does it officially follow the definitions set by United Nations institutions. However, it does accept the principles of South-South cooperation adopted in Nairobi as the successor to the demands of NAM, of which Cuba was a standard-bearer. The final reports of the Congresses of the Communist Party of Cuba set out the following principles for the country's foreign policy and cooperation:<sup>10</sup>

- Principle of peaceful coexistence.
- Solidarity with peoples, especially those of the Third World, in their striving for development and in the face of disasters that may affect them.
- Unconditional collaboration, with unrestricted respect for nations' sovereignty, national laws, culture, religion and self-determination.
- Rejection of the use of collaboration as a political instrument to interfere in the internal affairs of States.
- This collaboration and the Cuban personnel participating in collaboration activities must exemplify the values of solidarity and moral integrity promoted by the Cuban Revolution.
- Principle of mutual respect and sovereign equality (see annex III.A1, South-South Cooperation in the reports and guidelines of the Communist Party of Cuba).

<sup>10</sup> In these reports, the term “collaboration” is used to refer to cooperation.

By following a cooperation model defined by the principles of internationalism, solidarity and complementarity, Cuba has succeeded in strategically linking cooperation policy with foreign policy, thereby overcoming its political isolation by the United States (Ojeda, 2019, p. 91). Multilateral institutions, and especially the United Nations General Assembly, are the forums where recurring calls for an end to that isolation and the economic, commercial and financial embargo are made.<sup>11</sup> In 1992, for the first time, the General Assembly condemned it by a vote of 59 to 17 and demanded that Washington suspend the policy (Alzugaray, 2014, p. 189). For Cuba this was the culmination of an era of intense bilateral cooperation and the establishment of diplomatic relations with countries in different regions of the world. At the end of the 1990s, Cuba maintained diplomatic relations with 167 of the 185 States recognized by the United Nations and 116 diplomatic missions abroad: 93 embassies, 21 consulates and two interest sections (Romero, 2015, p. 109).

## **B. The Cuban experience with South-South cooperation**

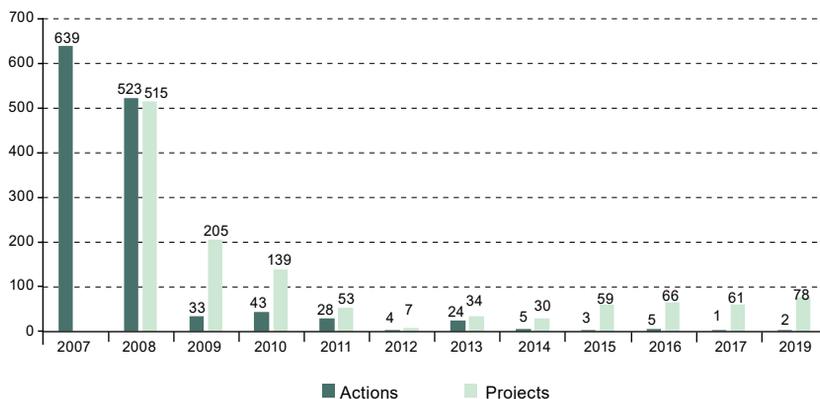
The model used to systematize Cuban South-South cooperation is eminently qualitative and prioritizes results over economic disbursements. Many of the indicators and variables used by the country to report on its cooperation are not in line with those of other South-South cooperation donors, which leads to certain imbalances in combining and comparing the data. Information on the collaboration agreements the country has signed is reported in terms of technical contributions and knowledge transfers.

Thus, the systematization work of organizations such as the Ibero-American General Secretariat (SEGIB) is valuable because it summarizes the behaviour of actors in terms of the number of South-South cooperation projects and activities they execute and receive, as well as the main sectors targeted. Cuba has been contributing to those statistics since 2007 (see figure III.1).

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<sup>11</sup> The embargo was imposed on Cuba by the United States in 1960 in response to the nationalization of companies by the island's socialist government in the first months of the revolution. In 1992, the Cuban Democracy Act was adopted and, in 1996, the United States Congress passed the Helms-Burton Act (Guerra Rondón, 2019). These acts are known internationally as an embargo, but Cuba distinguishes between this term and the word "blockade", arguing that the blockade transcends the meaning of an embargo because it seeks to isolate Cuba, "stifle its people and compel it to renounce its decision to be sovereign and independent" (CubavsBloqueo, 2020).

Figure III.1

**Cuba: South-South cooperation actions and projects with Latin America, 2007–2019**

**Source:** Prepared by the author, on the basis of Ibero-American General Secretariat (SEGIB), *Informe de la cooperación Sur-Sur y triangular en Iberoamérica 2020*, Madrid, 2021; *Informe de la cooperación Sur-Sur en Iberoamérica 2009*, No. 4, Madrid, 2009.

In 2008, 85% of Cuba's bilateral South-South cooperation actions were focused on its main recipient partner, the Bolivarian Republic of Venezuela, with which it has maintained strong political and economic ties since early 2000 thanks to the signing of the Caracas Energy Cooperation Agreement. However, the island's tradition of solidarity explains why 15% of the remaining actions were distributed —without exception— among the region's remaining countries, with relative shares of 2.5 percentage points or less. Thus, apart from the Bolivarian Republic of Venezuela, Cuban cooperation was mainly distributed among its partners in the Caribbean (Dominican Republic), Central America (Guatemala, Honduras, Nicaragua and Panama) and the Andean subregion (Colombia, Ecuador and the Plurinational State of Bolivia) (SEGIB, 2009, p. 45). Currently, the main recipient partners of Cuban South-South cooperation are Mexico, Colombia and Argentina. In 2019, this role accounted for 86% of the island's total participation in bilateral initiatives.

The country systematizes its cooperation according to the programmes to which it contributes as a donor using the modalities of technical, scientific and financial cooperation. Study grants are included in the last modality. Table III.1 shows the main technical cooperation programmes carried out in the social sector.

**Table III.1**  
**Notable social programmes of Cuban South-South cooperation**

| Social programme  | Description  |
|---|--|
| Cooperation programme between Nicaragua and the Russian Federation supported by the Pan American Health Organization (PAHO) and Cuba    | Technology transfer agreement for the creation of a plant to produce vaccines against the influenza virus.   |
| More Doctors ( <i>Mais Médicos</i> ) Programme <sup>a</sup>   | Provides medical assistance to low-income populations in the remotest areas of Brazil, including the indigenous peoples of the Amazon.   |
| Comprehensive Health Programme (PIS)  | Deploys health professionals abroad for a maximum period of two years. During that time, the doctors provide training and education and facilitate technology transfers to ensure the project's sustainability         |
| Operation Miracle ( <i>Operación Milagro</i> )  | Ophthalmology care and surgery for patients without access to those services (a component of Cuba's collaboration with the Bolivarian Republic of Venezuela).  |
| Triangular cooperation programme between Nigeria, Libya and Cuba  | Cuba contributes the technical capacity while the other countries contribute the financial resources. The programme has been extended to other African countries to provide primary health care for their populations. |
| Triangular cooperation programme between Brazil, Cuba and the World Health Organization (WHO) for the production of meningitis vaccines | Low-cost production of the vax-MEN-AC vaccine to combat meningitis A and C in 23 African countries.  |
| Latin American School of Medicine   | Trains basic-level general practitioners, with a focus on primary health care (a component of the Comprehensive Health Programme (PIS), through which Cuba extends medical collaboration to several countries).        |
| <i>Yo Sí Puedo</i> ("Yes I Can") Cuban literacy programme   | Created in 2001, the programme involves a composite teaching method intended to facilitate learning to read and write, using a booklet that combines numbers and letters to teach reading and writing to adults.       |
| International School of Physical Education and Sports   | Created with the aim of training foreign students to promote sport in their countries of origin.   |

**Source:** Prepared by the author, on the basis of T. Ojeda, "La cooperación Sur-Sur de Cuba: autoafirmación y solidaridad internacional", *La cooperación Sur-Sur en América Latina y el Caribe: balance de una década (2008-2018)*, T. Ojeda and E. Echart (comps.), Buenos Aires, Latin American Social Sciences Council (CLACSO), 2019.

<sup>a</sup> Six months after the establishment of the More Doctors programme, there were 11,430 Cuban collaborators in Brazil, representing 79% of the total number of doctors who responded to the call, who also included Argentines, Spaniards and Brazilians. PAHO agreed to pay the company Comercializadora de Servicios Médicos Cubanos, S.A. a total of 10,000 reais (approximately US\$ 4,200) per doctor per month. In total, it is estimated that Cuba received over US\$ 1.27 million through this agreement (Schamis, 2019).

Cuba has enjoyed recognition in the field of health since the early twentieth century following its creation in 1909 of the world's first Health and Welfare Department. With the adoption of the 1940 Constitution, the Government of Cuba established the Ministry of Health and Social Welfare. From the professional point of view, Cuban doctors have been recognized for their participation in international secretariats and health conventions since the start of the twentieth century. Cuban doctor Juan Guiteras Gener was

a founder of the International Sanitary Bureau and one of the experts who approved the first Pan American Sanitary Code. Subsequently, following the victory of the Cuban Revolution, the country experienced a massive exodus of 50% of its physicians (Marimón and Martínez, 2010), which impacted the sector at a time of profound national changes.

For Fidel Castro, the country's ability to recover from events of this kind reaffirmed the anti-imperialist sentiment that drove the Revolution in its early years and that it upholds to the present day. On 17 October 1962, the Victoria de Girón Institute of Basic and Preclinical Sciences was inaugurated with a call to internationalism as a principle of Cuban medicine:

“And for that reason, while talking with the students today, we told them that we need 50 volunteer doctors to go to Algeria, to go to Algeria to help the Algerians. And we are certain that volunteers will not be lacking. Only fifty. We are sure that more will come forward, as an expression of our people's spirit of solidarity with a friendly people who are worse off than us” (Castro, 1962).<sup>12</sup>

Through a thoughtful and organized process to improve the management of public health, a national system was created and consolidated in the 1970s, which in turn gave way in the 1980s to a primary care model based on prevention rather than cure. Over the following decade, Cuba expanded its capacity as a trainer of international medical personnel by granting scholarships for foreign students to study medicine at the Latin American School of Medicine (ELAM), which was inaugurated in 1999. Figure 2 summarizes Cuban cooperation actions by sector over the first 25 years of the Revolution.

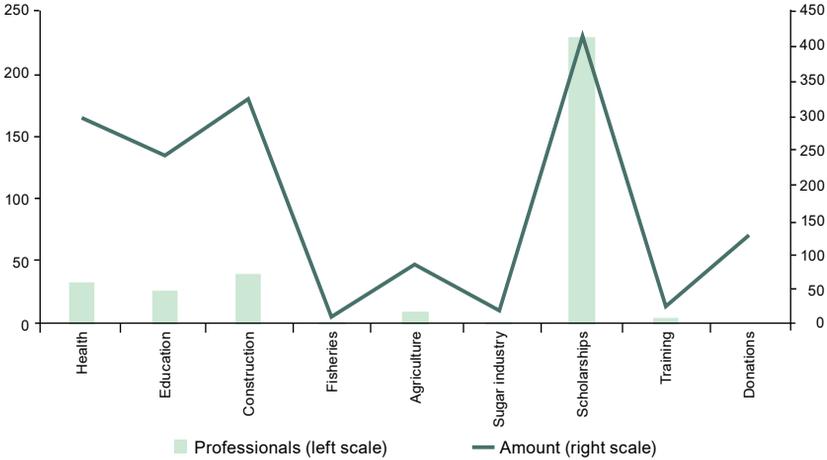
In October 1961, Cuba received its first 15 medical students, from Guinea. Thousands more arrived in the country in the decades that followed.<sup>13</sup> Until 1970, foreigners benefiting from the scholarship programme outnumbered the medical personnel sent abroad. In 2004, 17,700 students from 115 countries were studying more than 30 degree courses in Cuba (De Vos and others, 2007, p. 772). In the first 25 years of international cooperation, Cuba contributed to the building of medical schools in Africa, which explains the amount of money spent in this sector

<sup>12</sup> Ben Bella, who served as President of Algeria from 1963 to 1965, told Fidel about his people's health situation, which led Castro to immediately assume resolving the international health crisis as the mission and *raison d'être* of the new institute. A total of 56 Cubans made up the country's international assistance mission in Algiers, who remained in the country for seven months at the expense of the Government of Cuba (Molina, 2013).

<sup>13</sup> In 2014, Cuba was the only country to record cooperation initiatives with all the non-Ibero-American Caribbean nations, which SEGIB (2015) correlates with the island's policy of scholarships for the region. These undertakings accounted for 61.8% of the total number of activities carried out, outstripping even the health sector. In addition to scholarship programmes, this percentage is accounted for by the implementation of the *Yo Sí Puedo* literacy programme.

(US\$ 322.2 million) compared to technical cooperation in the fields of health and education. The countries that benefited from this initiative were Yemen (1976), Guyana (1984), Ethiopia (1984), Uganda (1986) and Ghana (1991) (Kirk and Erisman, 2009; De Vos and others, 2007).<sup>14</sup>

**Figure III.2**  
**Cuba: cooperation with the rest of the world, by sector and modality, 1963–1989**  
*(Thousands of collaborators and millions of dollars (estimated))*



**Source:** Prepared by the author, on the basis of H. Morales, *Ayuda oficial al desarrollo de Cuba en el mundo*, Guatemala City, 2017 [online] <http://mesadearticulacion.org/wp-content/uploads/2018/03/AOD-de-Cuba-en-el-mundo-2017-a-distribuir.pdf>.

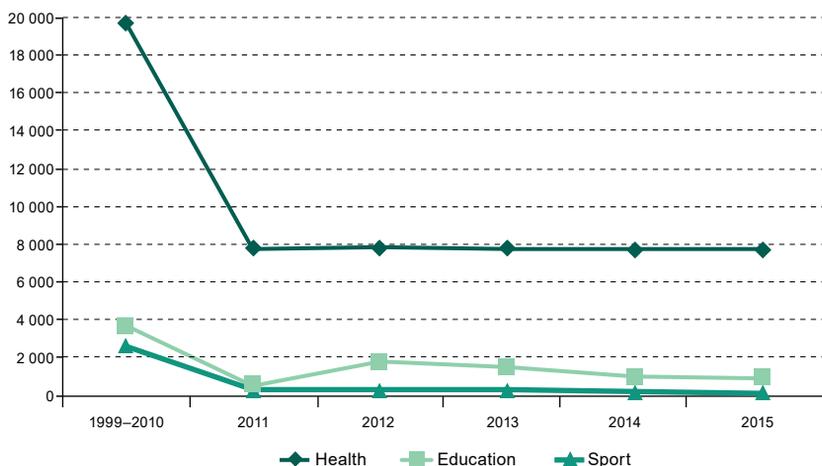
Large-scale natural disasters in Central America during the 1990s caused a shift and redirection of Cuban aid to the subregion: in response, the Comprehensive Health Programme (PIS) was created, first targeting Central America and the Caribbean and later extended to Africa and the Pacific Islands. During the G-77 South Summit, held in Havana in 2000, the creation of a South-South Cooperation Programme was agreed upon as a health sector cooperation alternative for the countries of the southern hemisphere. Under that agreement, Nigeria and Libya provided the funding and Cuba supplied the human resources. Six African countries participated in the programme: Burkina Faso, Niger, Chad, Sierra Leone, Mali and the Gambia (Marimón and Martínez, 2011, pp. 385, 386 and 388). In 1999, with the beginning of cooperation with the Bolivarian Republic of Venezuela, Cuban internationalism was revived and, with Bolivarian financing, special collaboration programmes were established.

<sup>14</sup> During the first decade of this century, schools were built in the Gambia (2000), Equatorial Guinea (2000), Haiti (2001), Guinea-Bissau (2004) and Timor-Leste (2005).

Over a period of four decades, Cuba deployed an approximate total of 134,000 worker-years in 94 countries, giving an average of 3,350 health-sector workers working abroad every year from 1960 to 2000 (De Vos and others, 2007, p. 764). In all, more than one million Cubans participated in overseas missions between 1960 and 2016 (Morales, 2017) (see annex III.A.2, Cuban medical practitioners deployed on international missions, 1999–2016).

There has been an exponential growth in the participation of Cubans in international missions since 2005. Between 2001 and 2010, more than 27,000 professionals were deployed on missions in the Bolivarian Republic of Venezuela (Morales, 2017). The Barrio Adentro Mission alone mobilized more than 20,000 doctors specializing in ophthalmology, oral medicine and general practice. In 2008, the sales scheme of the Cuba-Venezuela Comprehensive Cooperation Agreement was modified, with only short-term invoices being issued. The amounts were payable on a quarterly basis in conjunction with the medical services of the Barrio Adentro II Mission (PDVSA, 2016; De Vos and others, 2007). The new International Cooperation Act limits missions by Cubans abroad as part of collaboration programmes and agreements to a period of three years (see figure III.3).<sup>15</sup>

**Figure III.3**  
**Volume of Cuban cooperation by sectors, 1999–2015**  
*(Millions of dollars)*



**Source:** Prepared by the author, on the basis of H. Morales, *Ayuda oficial al desarrollo de Cuba en el mundo*, Guatemala City, 2017 [online] <http://mesadeararticulacion.org/wp-content/uploads/2018/03/AOD-de-Cuba-en-el-mundo-2017-a-distribuir.pdf>.

<sup>15</sup> With the possibility of extension on an exceptional basis with the approval of MINCEX (Decree Law No. 16, article 22.1).

The development of medical diplomacy (Huish, 2014; Kirk and Erisman, 2009; Feinsilver, 2008; Hammett, 2003) for humanitarian and strategic reasons has expanded from disaster and emergency relief to the provision of specialized medical care and teacher training. The provision of medical assistance to developing countries has played a crucial role in Cuba's international relations. These programmes have been positively reinforced in recent years through recognition extended by multilateral institutions that lend legitimacy to Cuba's good practices.

## **1. Regional and multilateral participation**

In the framework of its South-South relations, Cuba channels its projects through various regional organizations and multilateral institutions. Ideological and geopolitical considerations influence the selection of those bodies. For example, Cuban relations with the Caribbean Community (CARICOM) occupy an important place in the country's foreign policy priorities, with a particular emphasis on the services sector (Romero, 2015). Cuba acts as an informal spokesperson for the Caribbean and as a bridge to the rest of Latin America. It demonstrated this to the Community of Latin American and Caribbean States (CELAC) when it reiterated that the organization would not have a truly regional scope if it did not secure the participation of all the countries of the Caribbean (Romero, 2015). As regards the renewal of the institutional framework for South-South cooperation, Cuba clarified in the final document of the 2014 CARICOM Summit that both Haiti and the other Caribbean countries would continue to receive preferential cooperation treatment, thanks to the cooperative ties that have united the bloc since 1973.

The World Health Organization (WHO) and the Pan American Health Organization (PAHO) are two organizations with which Cuba has historically maintained a close technical relationship (see annex III. A3, Joint programmes between Cuba and the Pan American Health Organization). In 2007, following a request lodged by PAHO/WHO with the Cuban Ministry of Public Health, a proposal for interregional technical cooperation between the regional health offices of Africa and the Americas was drawn up. This initiative sought to provide tailored responses to the global polio problem (Marimón and Martínez, 2011, p. 388). One of the most important Cuban medical missions in Africa was in the fight against Ebola during 2014: a total of 256 Cuban volunteers responded to the call made by the Ministry of Public Health and to the request of WHO Director-General Margaret Chan (see box III.2).

As soon as the United Nations Secretary-General and Margaret Chan requested Cuba's express support to combat the Ebola outbreak, the country convened, in Havana, a Special Summit of the Bolivarian Alliance

for the Peoples of Our America (ALBA) on international cooperation to tackle the epidemic. After this meeting of heads of State, a technical meeting of specialists and managers was held to discuss controlling and dealing with the virus. At that meeting, which was held on 30–31 October 2014 in the Cuban capital, 278 experts from 34 countries exchanged experiences for the strengthening of national action plans and the design of a joint Latin American and Caribbean regional strategy to address the epidemic. As a result, it was decided to organize the first international course on preventing and tackling Ebola, which was held at the Pedro Kourí Institute of Tropical Medicine on 10–15 November 2014 (Romero, 2015; PAHO, 2014). Faced with the health crisis caused by the coronavirus disease (COVID-19), in February 2020 Cuba held an emergency meeting with representatives of WHO and PAHO to prevent the entry of COVID-19 into the country and to control its transmission if cases were detected. On that occasion, Cuba proposed an exchange of experiences with other Latin American countries (Guerra Rondón, 2020a).

### Box III.2

#### Testimonials from doctors assigned to the Ebola mission in Africa

“No money can compensate what we did [...] we went on a suicide mission [...] money was not going to compensate us for what we did [...] Never, never [...] The British were earning US\$ 1,600 a day per person (more than US\$ 50,000 a month), plus the per diems [...] and people would ask us, did you come for free? Yes, for free, because we only received the per diem, not the salary, which Cuba waived” (Nursing graduate Orlando O’Farril Martínez, cited in Morales, 2017, p. 79).

“We knew that if we died our remains would not be able to return to Cuba for five years. We knew that if we fell in combat, that’s where we would remain: we were at war. We all signed that agreement before we left and it was completely voluntary; anyone who didn’t want to go on this mission could refuse it and continue with what he was doing, even going on another mission. We had thousands of volunteers to fill the 256 places” (Jorge Delgado, head of the Ebola medical brigade in Africa, quoted in Ravšberg, 2015).

**Source:** H. Morales, *Ayuda oficial al desarrollo de Cuba en el mundo*, Guatemala City, 2017 [online] <http://mesadearticulacion.org/wp-content/uploads/2018/03/AOD-de-Cuba-en-el-mundo-2017-a-distribuir.pdf>; F. Ravšberg, “Los guerreros que vencieron el ébola”, *Diario Público*, Madrid, 25 November 2015 [online] <https://www.publico.es/internacional/guerreros-vencieron-ebola.html>.

Of the regional organizations through which Cuba conducts its cooperation projects, ALBA is undoubtedly the one with the greatest weight in terms of the number of projects and actions. Particular levels of dynamism were recorded between 2007 and 2009 thanks to the fruitful relationship between the member countries of the Alliance. The cooperation agreement signed with the Bolivarian Republic of Venezuela stipulates that Cuba must provide, among other things, 30,000 medical

professionals, 600 comprehensive health clinics, 600 physical therapy and rehabilitation centres, 35 high-tech diagnostic centres and 100,000 eye surgery services. In the first five years following the signing of this agreement, 483 comprehensive diagnostic centres, 26 high-tech centres and 548 comprehensive rehabilitation facilities had been set up, yielding a total of 332 million medical consultations and 19 million rehabilitation patients (Marimón and Martínez, 2010, p. 255). To ensure the sustainability of these programmes, Cuba agreed to train 40,000 doctors and 5,000 health workers in the Bolivarian Republic of Venezuela and to provide full scholarships for 10,000 Venezuelans to study medicine and nursing on the island. In exchange, the Bolivarian Republic of Venezuela agreed to provide 53,000 barrels of oil a day (Feinsilver, 2008, p. 111; Díaz, 2006, p. 7). In 2008, the Bolivarian Republic of Venezuela paid US\$ 5.6 billion for the medical services received and provided US\$ 2.5 billion in oil and US\$ 1.87 billion in other projects (Romero, 2010, p. 109).

The *Operación Milagro* mission was created within the framework of the Cuba-Venezuela Comprehensive Cooperation Agreement when it was determined that a high percentage of the Venezuelan population suffered from eye-related complaints. In the first six months, around 19,180 Venezuelan patients were sent to Cuba and 18,745 ophthalmology interventions were performed. By 2014, a total of 3,482,361 patients had undergone surgery, allowing them to improve or recover their eyesight. Of that figure, 2,871,043 were patients from ALBA countries (SELA, 2015, p. 20; De Vos and others, 2007, p. 771).

Within South-South cooperation in the education sector, the *Yo Sí Puedo* programme has been one of the most important Cuban-led initiatives. As of 2014, 3.8 million people had acquired literacy through this method (SELA, 2015, p. 20), which was created in 2001 by Cuban teacher Leonela Inés Relys Díaz to enable illiterate people to learn to read and write in 65 days. The programme, specially designed to support Cuban South-South cooperation, uses a variety of teaching methods (such as radio and television) and adapts to the different cultural contexts of the recipient countries (Ojeda, 2013, p. 148). The method has already been used for some Pacific Island languages and indigenous languages of Latin America.

As regards multilateral activities, in early 2019 Cuba chaired the third meeting of the Forum of the Countries of Latin America and the Caribbean on Sustainable Development, in addition to participating in the voluntary commitments in the partnerships for the online platform of the Sustainable Development Goals (SDGs). The following are among the projects being executed:

- Fisheries Conservation in the Wider Caribbean Region through the FAO Western Central Atlantic Fisheries Commission (WECAFC)
- Generation and Delivery of Renewable Energy based Modern Energy Service: the Case of Isla de la Juventud
- IHO Hydrography Capacity Building Programme for Coastal States
- IWECO – Integrating Water, Land and Ecosystems Management in Caribbean Small Island Developing States (United Nations, 2021)

Although the evolution of regional South-South cooperation projects, programmes and initiatives in Latin America and the Caribbean peaked in 2013, the number of initiatives executed has remained stable to date. These regional policy dialogues on South-South cooperation are making progress in the search for ways to accelerate the implementation of the SDGs, and Cuba has been active in recognizing the importance of the 2030 Agenda for Sustainable Development and contributing, mainly, to the fulfilment of Goals 3, 4 and 11. In 2019, Cuban participation accounted for 22.5% of all South-South cooperation initiatives in the region (SEGIB, 2021). In addition to the cooperation it has already been undertaking, the country has sought to strengthen global partnerships through involvement in large-scale projects that align with its areas of expertise and the regions where it has the greatest foreign policy interests.

## **2. Cuban humanitarian aid following natural disasters**

Ramos (2011, p. 26) states that the Government of Cuba's first act of solidarity took place in 1959, four months after the triumph of the Revolution, during the visit of then Prime Minister Fidel Castro to the city of Tacuarembó in Uruguay. Before continuing his tour of the South American countries, and after learning of the impact of the floods in that area, Castro visited the site and ordered the donation of 20,000 pesos to the Uruguayan peasants from the Cuban Agrarian Reform. Something similar happened in 1960, but this time the Cuban people got involved in humanitarian aid work, an act that Fidel highlighted on numerous occasions and that reinforced the government's perception that it could achieve great things with scant resources (Guerra Rondón, 2020b).

The Ministry of Foreign Affairs launched an international appeal for humanitarian aid after the devastating 1960 earthquake in Valdivia, Chile—the most powerful earthquake ever recorded by instruments in the history of mankind (9.5 on the Richter scale)—which was followed by tidal waves and volcanic eruptions that ensued over the space of a week. Cuba responded by sending clothes, medicines and food worth

one million pesos, in addition to a medical brigade under the direction of Dr. Oscar Fernández Mell (Ramos, 2011, p. 31).

Cuban cooperation has shown great leadership in both emergency aid and disaster prevention. Hurricane Flora, which affected the eastern region of the country and caused the death of more than 1,150 people in 1963 (González, 2018), marked a before and after in the history of Cuban civil protection. After this event, the country instituted a civil protection system and an early-warning system for tropical cyclones that earned it international recognition (Ravsberg, 2015).<sup>16</sup>

Not only does Cuba react swiftly to emergency situations; it also has an admirable capacity for international mobilization. In 1970, after the Callejón de Huaylas earthquake struck Peru, the Cuban representative to the United Nations requested an audience with Secretary-General U Thant to request international aid for the affected population. This request led to the approval of a US\$ 200 million emergency fund to provide Peru with urgent assistance (Ramos, 2011, p. 112). Something similar happened in 1985 when the Cuban Foreign Minister called on creditor countries to cancel Mexico's foreign debt to allow the country to allocate more funds to the reconstruction of Mexico City in the wake of the devastation caused by the earthquake of September that year. The same request was made for El Salvador, Guatemala, Honduras and Nicaragua following the passage of Hurricane Mitch through Central America in 1998 (Ramos, 2011, pp. 137 and 198). In this context of major events affecting the region, Cuba recognized that its material contribution was modest but that its value lay in encouraging all others to contribute to reconstruction and development (*El Mundo*, 1998).

In August 2005, the Government of Cuba created the Henry Reeve Medical Brigade, composed of 1,586 health professionals and tasked with providing assistance to the population affected by Hurricane Katrina in New Orleans, United States. The brigade remained active after that event and evolved into a highly trained group for the provision of emergency and first-response disaster services (see annex III.A4, Cuban humanitarian aid from 1959 to 2015).<sup>17</sup>

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<sup>16</sup> In 1966, Law No. 11/94 was enacted, creating the Civil Defence and taking into account the results of the study of the impact of Hurricane Flora in the country's eastern region. In 1977, Law No. 13/16 was adopted, improving the civil defence system and reflecting the country's new political-administrative divisions. In 1994, Law No. 75 on National Defence was adopted, chapter 14 of which reinforces the principle of maintaining an improved civil defence system and the State's determination to do so. In 1997, Decree Law No. 170 on the Civil Defence Measures System was adopted, establishing a series of response and preparatory measures for disaster reduction (Hernández, 2017).

<sup>17</sup> Between 2005 and 2015, the brigade participated in 17 emergency missions to 15 countries, most notably assisting Pakistan after the 2005 earthquake. Cuban medical personnel were deployed for six months and, once the mission was over, donated the 32 equipped field hospitals, while the Government of Cuba offered 1,000 scholarships to study medicine on the island (Kirk and Erisman, 2009).

## C. Conclusions and lessons learned

Several conclusions can be drawn from this analysis of Cuban South-South cooperation. The first is the existence of a narrative shaped by the guiding principles of South-South cooperation. This background to this discourse can be found in the leading role Cuba assumed in NAM and in its national social development strategies, where health and education have been central objectives of Cuban foreign policy interests. Thus, South-South cooperation is in line with the public policies implemented by the country since the 1960s.

The second conclusion derives from how Cuba adapted its discourse to international trends in the conceptualization of South-South cooperation. While the country used to call its cooperation actions “solidarity” and “collaboration”, in recent years its official speeches and documents have adopted the terms proposed by the international community. In practice, this represents a commitment to reimbursable cooperation that does not generate costs. This change was the result not only of the influence of multilateral mechanisms, but also of the impact of the economic reform process and the changing international context.

At the same time, the Cuban South-South cooperation system still lacks a legal and regulatory framework suited to the wealth of cooperation on offer. While the country has taken its first steps towards a new International Cooperation Act, the resolution that currently regulates it is not aimed at guiding the cooperation the country offers, but rather the cooperation it receives. The system needs to improve its capacity to manage the data collected, so they can be made available to the public. At present, the indicators applied are unknown, and this hinders harmonization with the statistical systems of other Latin American and Caribbean countries. Reporting on those indicators will ultimately help consolidate the methodology for assessing South-South cooperation and ensure progress towards shared methods.

Cuba has, since its first international missions, emphasized the transfer of knowledge and the deployment of professionals in receiving countries. Cuban South-South cooperation adopted a model that seeks to be lasting and sustainable over time and, to that end, it tends to place a higher priority on participation in programmes and projects than on specific cooperation actions. Its procedures for transferring technology and expertise have earned it international recognition on multiple occasions and ensured it international legitimacy in health and education.<sup>18</sup>

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<sup>18</sup> In 2017, Cuba’s Henry Reeve Medical Brigade received the Dr. Lee Jong-wook Memorial Prize for Public Health, awarded by the WHO Executive Board, in recognition of its international solidarity work in dealing with natural disasters and serious epidemics (Ojeda, 2019). In 2020, the brigade was nominated by numerous foreign civil society organizations and supporters of the Government of Cuba for the 2021 Nobel Peace Prize, and the World Peace Council formally registered the nomination at the end of September 2020.

## D. Recommendations

Given Cuba's interest in standardized criteria for assessing South-South cooperation, it would be useful to deepen its partnerships with organizations such as the Economic Commission for Latin America and the Caribbean (ECLAC) and the Ibero-American Program for the Strengthening of South-South Cooperation (PIFCSS) to harmonize the system for managing cooperation data. Since Cuba does not have a validated or recognized methodology for assessing its cooperation, peer learning and knowledge transfer could allow the country to innovate or adopt proposals from other Latin American countries' systems.

International cooperation planning remains a pending topic in many of the countries of the global South, and Cuba is no exception. It would be useful to explore more precise strategies that orient cooperation by three- or five-year periods (to keep in line with the planning of the Cuban economy) and not merely include it as one of the many elements in foreign policy planning. Planning makes it possible to predict management needs and in no way affects the signing of ad hoc conventions or agreements resulting from South-South cooperation forums.

In its dual role as a provider and recipient of international cooperation, Cuba has adopted project management systems for this cooperation. For that reason, the country is in a position to innovate with regard to the monitoring and evaluation of South-South cooperation projects.

As noted in numerous United Nations documents, State partnerships with other development actors in the country must be strengthened in order to enrich South-South cooperation experiences and to make progress towards a cooperation model in which non-State actors have a real practical presence and steps can be taken towards decentralizing cooperation.

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## Annex III.A1

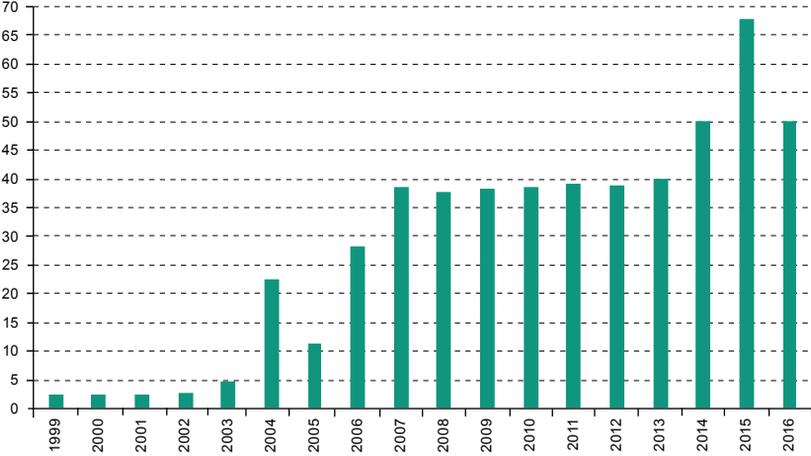
### South-South Cooperation in the reports and guidelines of the Communist Party of Cuba (PCC)

| Cuba | <b>First Congress of the Communist Party of Cuba: International Policy Resolutions (1975)</b>   | <b>Second Congress of the Communist Party of Cuba: International Policy Resolutions (1980)</b>   | <b>Third Congress of the Communist Party of Cuba: International Policy Resolutions (1986)</b>   |
|------|---|--|---|
|      | Solidarity with communist forces and revolutionary movements of the left. Struggle against imperialism. Forging ties with the Non-Aligned Movement (NAM). Promoting relations with Latin America.   | Emphasis on bonds of friendship and collaboration with the countries building socialism in Asia and Africa. Continuation of economic and scientific/technical cooperation programmes with countries in Africa, the Middle East and Latin America and the Caribbean (a fundamental factor in Cuba's foreign relations). Continuation of the policy of solidarity by sending technicians and specialists where necessary. Promoting integration with Latin America and the Caribbean. Defence of national interests. Struggle against imperialism. Promotion of world peace. Submission of proposal in support of NAM to the United Nations. | Promotion of world peace (vital task of the State). Deepening brotherhood with Latin America and the Caribbean and promoting economic integration. Support for the Palestinian cause through intervention at the United Nations. Creation of alliances with anti-imperialist forces. Solidarity with the countries of Latin America and the Caribbean that oppose imperialism.  |
| Cuba | <b>Fourth Congress of the Communist Party of Cuba: Foreign Policy Resolution (1991)</b>   | <b>Fifth Congress of the Communist Party of Cuba: the Party of Unity, Democracy and Human Rights that we Defend (1997)</b>   | <b>Sixth Congress of the Communist Party of Cuba: Economic and Social Policy Guidelines (2011)</b>  |
|      | Fulfillment of internationalist duties by sending science workers, doctors, engineers, agronomists, teachers and researchers to Africa, Asia and Latin America. Promoting scholarships for students from Africa, Asia, the Middle East and Latin America (obligation of revolutionary solidarity). Integration of Latin America and the Caribbean (Ibero-American Summit). Defence of anti-imperialist principles, solidarity and internationalism. Democratization of the United Nations and its Security Council. | Continuation of the tradition of internationalism and solidarity.  | Prioritization of participation in the Bolivarian Alliance for the Peoples of Our America (ALBA). Participation in the Latin American Integration Association (LAIA), the Caribbean Community (CARICOM), the Association of Caribbean States (ACS) and Petrocaribe. Improvement of the legal and regulatory framework for cooperation. Development of international solidarity. Consideration of compensation, at least of the costs, for the collaboration provided by Cuba. Encouraging multilateral collaboration. |

**Source:** L. Guerra Rondón, "Las rutas sanitarias de la cooperación Sur-Sur cubana en tiempos de COVID-19", *Análisis Carolina*, No. 53/2020, Madrid, Carolina Foundation, 2020; "Brasil, Colombia, Venezuela y Cuba: un estudio transversal de las identidades, los intereses y los valores de los donantes de la cooperación Sur-Sur", Madrid, Complutense University of Madrid, 2020.

### Annex III.A2 Cuban medical practitioners deployed on international missions, 1999–2016

(Thousands)



**Source:** Prepared by the authors, on the basis of H. Morales, *Ayuda oficial al desarrollo de Cuba en el mundo*, Guatemala City, 2017 [online] <http://mesadearticulacion.org/wp-content/uploads/2018/03/AOD-de-Cuba-en-el-mundo-2017-a-distribuir.pdf>.

### Annex III.A3

## Joint programmes between Cuba and the Pan American Health Organization (PAHO)

| Period       | Joint programmes  |
|--------------|---|
| 1960s–1970s  | <ul style="list-style-type: none"> <li>– <i>Aedes aegypti</i> eradication programme</li> <li>– Nutrition programme in Cuba</li> <li>– Development programme for sanitary engineering professionals</li> <li>– National Water Supply Programme</li> <li>– Development Programme for Health Sector Personnel</li> <li>– Agreement for the development of the National Institute of Hygiene, Epidemiology and Microbiology in Cuba</li> <li>– Inoculation project in rural areas of Cuba</li> <li>– Zoonosis control project</li> <li>– Mother-and-child health outreach programmes</li> <li>– Medicine oversight programme in Cuba</li> <li>– Integrated health services programme</li> <li>– Health services and equipment management and maintenance programme</li> <li>– Course on public health programming</li> <li>– Integrated mental health service</li> <li>– Advanced health studies programme</li> <li>– Regional continuing education project for health personnel</li> </ul> |
| 1980s        | <ul style="list-style-type: none"> <li>– Medical assistance programme</li> <li>– Research programme on the perinatal and maternal risk approach</li> <li>– Sex education and family planning programme</li> <li>– Adult health programme (prevention and control of chronic diseases, elders' health, rehabilitation, mental health and oral health)</li> <li>– Rural development programme in the Province of Las Tunas</li> <li>– Projects to assess the health situation and health trends</li> </ul>  |
| 1990s        | <ul style="list-style-type: none"> <li>– Health sector analysis programme</li> <li>– Promotion of integrated organizational models for local-level health management</li> <li>– Strengthening health promotion and outreach work with a multisectoral approach</li> <li>– Promotion of interprogrammatic and intersectoral activities and projects</li> </ul>   |
| 2000–2003    | <ul style="list-style-type: none"> <li>– Strengthening the leadership and management of the National Health System</li> <li>– Municipal development project</li> <li>– Health and development project</li> <li>– Productive Municipalities Project</li> <li>– Specific integral projects: health and environment, solid waste, health promotion</li> <li>– Emergency humanitarian aid project in the Province of Guantánamo</li> <li>– Emergency project in the municipality of La Habana Vieja</li> <li>– Earthquake mitigation and preparedness project at health facilities in the municipality of Santiago de Cuba</li> </ul>   |
| 2004–present | <ul style="list-style-type: none"> <li>– Communicable diseases and international health regulations</li> <li>– Technical cooperation in services and health</li> <li>– Environment, health and health technologies</li> <li>– Life cycle, emergencies and disasters</li> <li>– Chronic non-communicable diseases and health promotion</li> <li>– Health economics, cross-cutting cooperation and knowledge management</li> </ul>  |

**Source:** Prepared by the authors, on the basis of Pan American Health Organization (PAHO), “Cuba” [online] <https://www.paho.org/es/cuba>; G. Delgado and M. Pichardo, *La representación OPS/OMS en Cuba: conmemorando 100 años de Salud*, Havana, Pan American Health Organization (PAHO), 2002.

## Annex III.A4

### Cuban humanitarian aid, 1959–2015

| Country/territory                  | Year      | Event             | Personnel assigned |
|------------------------------------|-----------|-------------------|--------------------|
| Uruguay                            | 1959      | Floods            | n.d                |
| Chile                              | 1960/1971 | Earthquake        | n.d                |
| Peru                               | 1970      | Earthquake        | 40                 |
| Nicaragua                          | 1972      | Earthquake        | 42                 |
| Honduras                           | 1974      | Hurricane         | 61                 |
| Mexico                             | 1985      | Earthquake        | 40                 |
| El Salvador                        | 1986      | Earthquake        | n.d                |
| Ecuador                            | 1987      | Earthquake        | n.d                |
| Nicaragua                          | 1988/1998 | Hurricane         | 39                 |
| Armenia                            | 1988      | Earthquake        | 105                |
| Iran (Islamic Republic of)         | 1990      | Earthquake        | 39                 |
| Nicaragua                          | 1991      | Floods            | n.d                |
| Nicaragua                          | 1992      | Volcanic eruption | n.d                |
| Dominican Republic                 | 1998      | Hurricane         | n.d                |
| Guatemala                          | 1998      | Hurricane         | n.d                |
| Honduras                           | 1998      | Hurricane         | n.d                |
| Colombia                           | 1999      | Earthquake        | n.d                |
| Honduras                           | 1999      | Floods            | n.d                |
| Venezuela (Bolivarian Republic of) | 1999      | Floods            | 447                |
| El Salvador                        | 2000      | Dengue outbreak   | n.d                |
| El Salvador                        | 2001      | Earthquake        | n.d                |
| Honduras                           | 2002      | Dengue outbreak   | n.d                |
| Algeria                            | 2003      | Earthquake        | 31                 |
| Haiti                              | 2004      | Hurricane         | n.d                |
| Indonesia                          | 2004      | Tsunami           | 25                 |
| Sri Lanka                          | 2004      | Tsunami           | 24                 |
| Guatemala                          | 2005      | Floods            | 688                |
| Pakistan                           | 2005      | Earthquake        | 2 564              |
| Guyana                             | 2005      | Floods            | 40                 |
| Bolivia (Plurinational State of)   | 2006      | Floods            | 602                |
| Indonesia                          | 2006      | Earthquake        | 135                |
| Peru                               | 2007      | Earthquake        | 81                 |
| Belize                             | 2007      | Floods            | 10                 |
| Mexico                             | 2007      | Floods            | 54                 |
| China                              | 2008      | Earthquake        | 43                 |
| El Salvador                        | 2009      | Floods            | 17                 |
| Haiti                              | 2010      | Earthquake        | 1 712              |
| Chile                              | 2010      | Earthquake        | 76                 |
| Haiti                              | 2010      | Ebola             | 887                |
| Nicaragua                          | 2010      | Leptospirosis     | –                  |
| Sierra Leone                       | 2014      | Ebola             | 168                |
| Guinea                             | 2014      | Ebola             | 40                 |
| Liberia                            | 2014      | Ebola             | 54                 |
| Chile                              | 2015      | Floods            | 15                 |
| Nepal                              | 2015      | Earthquake        | 48                 |
| Venezuela (Bolivarian Republic of) | 2015      | Floods            | 185                |
| Dominica                           | 2015      | Floods            | 16                 |
| Western Sahara (Sahrawi)           | 2015      | Floods            | 8                  |

**Source:** Prepared by the authors, on the basis of H. Morales, *Ayuda oficial al desarrollo de Cuba en el mundo*, Guatemala City, 2017 [online] <http://mesadearticulacion.org/wp-content/uploads/2018/03/AOD-de-Cuba-en-el-mundo-2017-a-distribuir.pdf>; University of Informatic Sciences (UCI), “Internacionalismo: misión Henry Reeve”, Havana, 19 September 2020 [online] <http://www.fidelcastro.cu/es/internacionalismo/mision-henry-reeve>; L. Ramos, *Fidel Castro ante los desastres naturales: pensamiento y acción*, Havana, Publications Office of the Council of State, 2011; Ibero-American General Secretariat (SEGIB), *Informe de la cooperación Sur-Sur en Iberoamérica 2009*, No. 4, Madrid, 2009; J. Kirk and H. Erisman, *Cuban Medical Internationalism: Origins, Evolution and Goals*, New York, Palgrave Macmillan, 2009; P. De Vos and others, “Cuba’s international cooperation in health: an overview”, *International Journal of Health Services*, vol. 37, No. 4, Thousand Oaks, SAGE Publishing, 2007.

## Chapter IV

# South-South cooperation: the case of Jamaica<sup>1</sup>

*Jessica Byron*

*Jacqueline Laguardia Martínez*

## Introduction

Jamaica was the first of the British territories in the Caribbean to become an independent State in 1962. Politically, it is a multiparty parliamentary democracy that has general elections every five years and a system of governance characterized by a regular alternation of power between the two largest political parties, the People's National Party (PNP) and the Jamaica Labour Party (JLP). The JLP administration that led the country into independence in 1962 emphasized the need for foreign policy pragmatism that would feature democratic values and the search for economic development (Manderson-Jones, 1990, pp. 125–127). However, as of 1969, under this administration, Jamaica participated in meetings of the Non-Aligned Movement (NAM) in Yugoslavia and Egypt. Jamaica was also engaged in strengthening its relations with African countries and giving support to anti-colonialist and anti-apartheid struggles in Africa (Manderson-Jones, 1990, p. 128). When the PNP came to power under Prime Minister Michael Manley in 1972, foreign policy and diplomacy became much more oriented

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<sup>1</sup> For the full analysis, please see ECLAC (2020a).

towards Third World partnerships even while seeking to maintain traditional relationships with the West. This strong interest in South-South relations is articulated in Prime Minister Manley's reflections below:

It should be clear ... in particular from our consideration of the problem of terms of trade, that Third World economic development cannot be analysed other than in the context of international affairs. Clearly, Third World countries must evolve a strategy in foreign affairs that reflects their common problems and needs ... All this must be seen in terms of a search for Third World self-reliance based upon a grasp of the similarity of Third World problems ... Beginning with Caribbean regionalism, a Jamaican foreign policy must be Third World in its economic orientation ... Finally, a foreign policy must recognize that we ... continue to import capital and know-how from the metropolitan world ... However, this must involve an 'open' foreign policy as distinct from the 'closed' policy of the past which only envisaged relations with our traditional partners. (Manley, 1974, pp. 103–128).

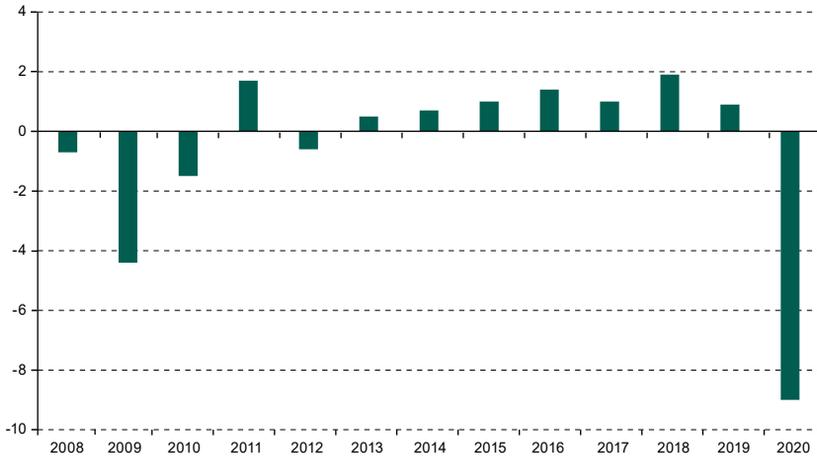
These were the political and ideological perspectives that underpinned Jamaica's early engagement with South-South cooperation.

Jamaica has a population of 2.73 million and a land area of 10,991 km<sup>2</sup> (STATIN, 2020; EIU, 2018). The annual population growth rate has been in decline since 2000, first reaching an all-time low of 0.2% in 2012, before falling to 0% in 2017 and 2018 (PIOJ, 2019; Thomas-Hope, Martin-Johnson and Lawrence, 2018). In addition to falling birth rates and an ageing population, demographic dynamics have been affected by high net emigration flows of over 12,000 individuals per annum since 2000. An estimated 1.3 million people of Jamaican birth reside abroad and, if the figures for second- and third-generation foreign residents of Jamaican ancestry are included, the diaspora consists of an estimated 2.8 million people (Thomas-Hope, Martin-Johnson and Lawrence, 2018).

Jamaica has a complex socioeconomic history characterized, above all, by the challenges of low growth and very high levels of debt (see figures IV.1 and IV.2). After an average annual economic growth rate of 6% between 1952 and 1972 in an economy based mainly on the proceeds of mining and tourism, political conflict and economic downturns in the 1970s and 1980s led to more than a decade of structural adjustment programmes and macroeconomic reform attempts under the International Monetary Fund (IMF) and the World Bank (Thomas, 1988; Payne and Sutton, 2001). Stabilization and growth efforts suffered further setbacks from a local banking crisis in the mid-1990s and the shock to the Jamaican economy dealt by the global economic recession that began in 2008 (Mooney and Schmid, 2018; Alleyne and others, 2011).

Figure IV.1

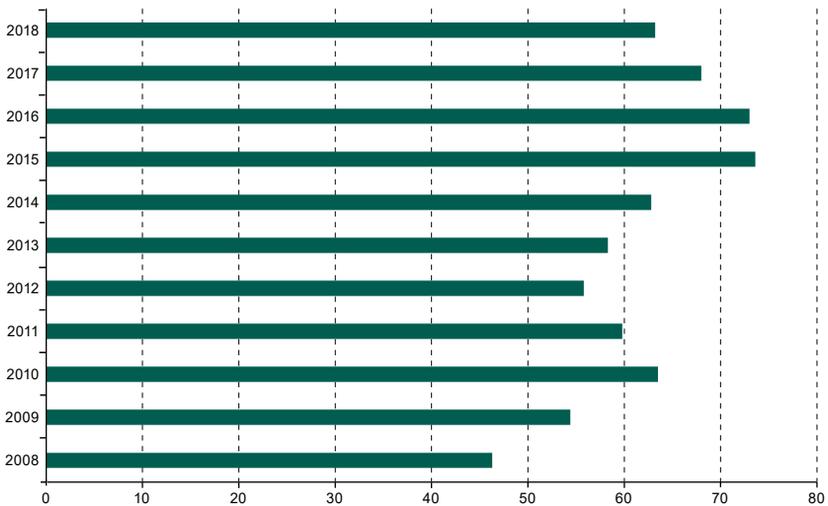
**Jamaica: annual growth rate of gross domestic product at constant market prices, 2008–2020**



**Source:** Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of official data, and ECLAC, *Statistical Yearbook for Latin America and the Caribbean*, Santiago, 2015, 2016, 2017, 2018 and 2019.

Figure IV.2

**Jamaica: external debt as a percentage of GDP, 2008–2018**



**Source:** Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of official data, and ECLAC, *Statistical Yearbook for Latin America and the Caribbean*, Santiago, 2015, 2016, 2017, 2018 and 2019.

Development efforts—and social and infrastructure investments in particular—have been hampered for many years by unsustainable levels of public debt, which reached 147% of GDP in 2012 (IMF, 2019b).

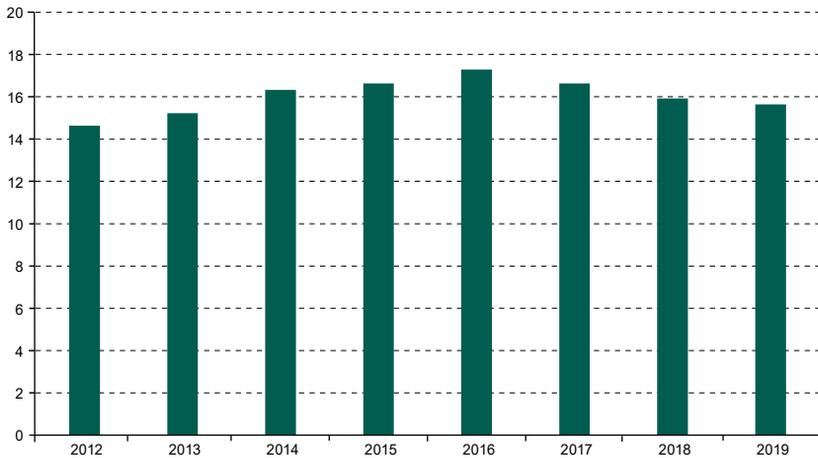
Debt servicing consumes a significant portion of annual government revenues, leaving little available for either social or infrastructure investments.

Finally, Jamaica ranks No. 30 in the World Disaster Exposure Rankings for 2019 (Bündnis Entwicklung Hilft/IFHV, 2019): it experienced 11 major tropical storms or hurricanes between 1988 and 2012, which caused significant losses in terms of life, shelter, physical and other infrastructure for the population and productive sectors. Jamaica's average economic growth rate since 1990 has approximated 1% per annum (Mooney and Schmid, 2018).

Jamaica's productive sectors have evolved considerably since the 1970s when bauxite and alumina mining, tourism, and sugar and bananas—exported mainly to the European Community under preferential market arrangements—were the dominant activities. In the contemporary era, the various components of the service sector account for 78% of GDP and provide 65% of employment (PIOJ, 2019). The World Bank reports that for Jamaica, trade in services in 2017 generated 39% of GDP. In 2018, service exports amounted to US\$ 3.8 billion while service imports amounted to US\$ 2.5 billion (WITS, n/d). Mining is slowly re-establishing itself after the global and regional recession of 2008 to 2012, and agriculture and manufacturing, while significant in terms of food security and the labour market, account for modest shares of GDP. Non-traditional exports from the fashion and cultural industries are promising but still emergent economic activities, encouraged under various trade and industrial policies since the 1990s, as the country searches for economic diversification.

Private remittance inflows are another significant source of income, particularly for individuals and households (see figure IV.3). Such inflows are estimated to have contributed around 14% to 16% of national GDP between 2006 and 2019 (Thomas-Hope, Martin-Johnson and Lawrence, 2018; World Bank, n/d). According to the Bank of Jamaica (BOJ), in the period April–July 2019, net remittance inflows increased by 27% in year-on-year terms. Between January and July 2019, remittance inflows to Jamaica totalled over US\$ 1.555 billion (BOJ, 2019).

**Figure IV.3**  
**Jamaica: personal remittances, 2012–2019**  
*(Percentage of GDP)*



**Source:** Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of official data.

Jamaica implemented an IMF extended fund facility (EFF) fiscal stabilization and reform programme between 2013 and 2016. During this time, the country had to maintain a primary surplus of between 7% and 7.5% of GDP, submit quarterly reports to IMF concerning its attainment of the targets set and practise stringent debt and expenditure management with the longer term goal of reducing the debt-to-GDP ratio to 60% by 2026. The EFF was followed from 2016 to 2019 by a precautionary stand-by arrangement (SBA). Jamaica successfully met the stabilization and debt management objectives of the two programmes. By the end of 2019, the debt-to-GDP ratio had been reduced to 94%, Jamaica's GDP exceeded the 2007 level for the first time, the GDP growth rate was 1.9% while inflation stood at 2.4%, unemployment had fallen to 8.4% and net international reserves had increased to US\$ 2.7 billion (PIOJ, 2019; IMF, 2019b; Ministry of Finance and Public Service of Jamaica, 2020). Despite these achievements, both IMF and government commentators conceded that overall growth has remained low and there are disturbing social trends to be addressed, which include the persistence of poverty, rising inequality and high crime rates. A 2019 report produced by the Planning Institute of Jamaica (PIOJ) and the Statistical Institute of Jamaica (STATIN) stated that there had been a significant redistribution of poverty across Jamaican communities such that the overall poverty rate of the country had not decreased. The net effect of the redistribution of poverty during the 2002–2012 period translated into poverty stagnation at the national level (PIOJ/STATIN, 2019b).

As of 2020, the country's human development ranking was 101 with a score of 0.734 (UNDP, 2020). Many policy initiatives have targeted poverty reduction and social protection since the mid-1990s. The poverty rate was 19% and PIOJ indicated an increase in inequality within Jamaican society, which currently has a Gini coefficient of 0.348 (PIOJ/STATIN, 2019a).

In light of Jamaica's hard-won achievements with debt reduction and strengthened fiscal policy management between 2013 and 2019, GDP growth for 2020 was projected at 1.1%, dependent on good performance in the tourism and commodities sectors and remittance inflows. Instead, 2020 has delivered the unprecedented social and economic shock of the coronavirus disease (COVID-19) pandemic to Jamaica and the entire world. In the second quarter of 2020, Jamaica was obliged to apply for balance of payments support from IMF in the amount of US\$ 520 million (IMF, 2020). As 2020 draws to a close, it is projected that Jamaica will register negative GDP growth of at least -5.3% (ECLAC, 2020c). Tourism visitor flows, which in 2018 accounted for 34% of economic output and 31% of total employment, were expected to decline by between 40% and 70%. The loss of direct employment due to the shock to the tourism industry is projected to range between 4% and 6.5% (IDB, 2020; Mooney and Zegarra, 2020). The overall loss of employment resulting from the social and economic measures adopted to stem the onslaught of the pandemic is expected to be much greater, especially for the informal sector and the self-employed. Although the Jamaican authorities responded to the crisis with a fiscal package that amounted to 1.2% of GDP (ECLAC, 2020c), as in most other Caribbean countries there is no national unemployment insurance scheme and the social protection system has limited capacity to address the full dimensions of the social and economic disruption caused by COVID-19. The pandemic's health toll in Jamaica as of 12 November 2020 was recorded as 9,780 cases, with 5,228 recoveries and 229 deaths (CARPHA, 2020). It is expected to increase the national debt burden, deepen poverty and inequality and severely undermine national advances towards achieving the 2030 Agenda and its Sustainable Development Goals (SDGs).

Since 2009, Jamaica's development has been guided by the bi-partisan Vision 2030, a long-term strategic plan to guide the country's development. Between 2015 and 2018, Vision 2030 was progressively aligned with the 2030 Agenda and the SDGs. The Fourth Medium Term Socioeconomic Policy Framework (MTF) is the operational guide for implementing development objectives during the 2018–2021 period (PIOJ, 2019). It designates the National Strategic Priorities for this period as the following:

- Human capital development with a focus on health and education
- Social protection and inclusion
- Preserving and developing wholesome values and attitudes

- Preserving the rule of law and timely justice
- Strengthening public sector efficiency and effectiveness
- Developing international competitiveness
- Strengthening environmental sustainability and climate change responses

In summary, despite changes of government and the passage of time, since the 1990s there has been remarkable continuity in the development challenges and objectives identified by Jamaican administrations and society as requiring the greatest focus. They include crime and the need for citizen security; poverty reduction and social protection for the many vulnerable groups; maintaining tight fiscal discipline and improving public and private sector governance; strengthening the health and education sectors; building country competitiveness and attracting investment and growth; energy security and the development of more renewable energy capabilities; creating jobs and engaging with migration and the diaspora for maximum mutual benefit. Finally, the challenges posed by climate change, extreme weather events and the need for more effective management and conservation of natural resources have resulted in greater emphasis on disaster risk reduction and resilience-building programmes. These public policy themes have all influenced Jamaica's engagement with its traditional and non-traditional development partners. In the wake of the COVID-19 pandemic, concerted new levels of national effort and global cooperation, including South-South and triangular cooperation, will be required to rescue and continue the advancement of Vision 2030 in synergy with the 2030 Agenda and the SDGs.

## **A. Definitions of South-South cooperation and triangular cooperation used in Jamaica, which shape the understanding of the process and related policy elaboration**

The two government bodies that are most directly concerned with the management of South-South cooperation and triangular cooperation are the Ministry of Foreign Affairs and Foreign Trade (MFAFT) and the Planning Institute of Jamaica (PIOJ). Their respective roles and functions are elaborated on in section D below. Both entities utilize the definitions of South-South cooperation and triangular cooperation that have been provided by the United Nations Office for South-South Cooperation (UNOSSC) as follows:

South-South cooperation is a broad framework of collaboration among countries of the South in the political, economic, social, cultural, environmental and technical domains. Involving two or more developing countries, it can take place on a bilateral, regional, intraregional or interregional basis. Developing countries share knowledge, skills, expertise and resources to meet their development goals through concerted efforts. Recent developments in South-South cooperation have taken the form of increased volume of South-South trade, South-South flows of foreign direct investment, movements towards regional integration, technology transfers, sharing of solutions and experts, and other forms of exchanges.

Triangular cooperation is collaboration in which traditional donor countries and multilateral organizations facilitate South-South initiatives through the provision of funding, training, management and technological systems as well as other forms of support (UNOSSC, n/d).

Documentation collected during fieldwork in Jamaica indicated that in addition to bilateral and some multilateral examples of South-South cooperation, there have been many instances of triangular cooperation involving funding countries or agencies, international organizations and groups of countries assembled from one or several Southern regions. Social policy was one theme emphasized in this type of cooperation: social protection, population issues including migration, community development, child protection, among other areas. These initiatives have included the objectives of identifying and showcasing good practices, supporting collaboration among countries of the South, engaging in group learning exchanges and establishing communities of practice. Within the Caribbean, Jamaica has also been engaged in government-to-government learning exchanges on the SDGs and other subjects.<sup>2</sup>

It can therefore be concluded that in the case of Jamaica, South-South cooperation encompasses interactions between and among developing countries, mutual learning exchanges and any form of technical and other cooperation among developing countries, including China. The emphasis is on developing and emerging economy partners and the commonality of their experiences, interests and goals. Triangular cooperation is not a new practice but has become more prevalent in recent years. This is based on international cooperation trends such as the organization of learning development conferences focusing on specific themes, the consciousness that such international platforms can add value, the search for new or agglomerated resources in times of reduced budgets, and international

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<sup>2</sup> These are listed in table IV.2 on South-South cooperation initiatives involving Jamaica, in the section on Jamaica as contributor to South-South cooperation with Belize and Saint Lucia on capacity building for social protection programmes, and technical cooperation with the Caribbean Community (CARICOM) on qualifying for climate change financing, and Jamaica as a beneficiary in the Cuba-UNDP Caribbean Risk Management Initiative (UNDP/CRMI).

fundurers' preference at times to render development support via a regional platform. All these factors have engendered new brain-storming methods and knowledge diffusion methodologies and practices in the international community concerning development, and the end result has been more extensive encouragement of triangular cooperation.

## **B. Historical antecedents to contemporary South-South cooperation in Jamaica**

Jamaica gained its independence in 1962 and first embarked on South-South cooperation in the early 1970s. The general concept of cooperation with other developing countries has been widely understood and embraced since that era. In more recent times, there have been new iterations of South-South cooperation, which focus both on supporting the achievement of the 2030 Agenda for Sustainable Development and on economic development imperatives.

The South-South dimensions of Jamaica's foreign policy were sharply defined during the Michael Manley administration (1972–1980). The country's leadership believed that it was necessary to counter the asymmetry in North-South relations and exchanges, with more equitable South-South relations both in multilateral forums and in bilateral relations.<sup>3</sup> On the multilateral level, Jamaica participated in the work of the Non-Aligned Movement (NAM) and in United Nations actions to institutionalize technical cooperation among developing countries under the Buenos Aires Plan of Action (1978) and to render support via the work of the United Nations Secretariat's offices, regional commissions, agencies, funds and programmes. The United Nations Conference on Trade and Development (UNCTAD) and the Group of 77 were viewed as significant venues for promoting South-South cooperation. Jamaica also adopted a strategy to diversify and expand its inter-State relations, building South-South cooperation via regional cooperation through the Caribbean Community (CARICOM), the Greater Caribbean including Cuba, Mexico, Venezuela<sup>4</sup> and the wider Latin American region, deepening engagement with other Third World groupings —as they were called at that time— as well as other bilateral arrangements. There was an emphasis on commodity barter arrangements, specifically involving petroleum and bauxite transactions. In addition to alleviating the foreign exchange shortages being experienced at that time, the objective was to strengthen South-South trade flows.

<sup>3</sup> Not only is this perspective articulated in Manley (1974), Manderson-Jones (1990) and Bernal (2016), it was echoed during interviews conducted in Kingston with current and former public officials in November 2019.

<sup>4</sup> In 1999, the official name of Venezuela was changed to the Bolivarian Republic of Venezuela. Accordingly, use of one or the other form depends on the year.

Significant initiatives undertaken in this framework included the concessionary petroleum trade with Nigeria in the 1970s. Likewise, the opening of diplomatic relations between Jamaica and Cuba in 1972 led to important cooperation programmes in the sectors of health, education and cultural development. Venezuela and Mexico also emerged as valuable Southern partners in the 1970s, playing active roles in regional cooperation institutions like the Caribbean Development Bank (CDB), of which they were both donor members, and in bilateral exchanges.

Another significant landmark in Jamaica's involvement in South-South cooperation was the 1980 launch of the Energy Cooperation Program for Central America and the Caribbean (San José Accord) among Mexico, Venezuela and eleven countries in the Caribbean and Central America.<sup>5</sup> Mexico and Venezuela undertook to provide concessionary financing for a portion of the annual fossil fuel imports of the beneficiary countries and access to a related amount of funding on concessionary terms for investment in development projects.<sup>6</sup> The agreement included a trade promotion dimension in that beneficiary countries committed to increase their trade with Mexico and Venezuela. The San José Accord lasted for 25 years and generated financing for infrastructural and social development projects in the participating countries.

As of the 1990s, Jamaica's involvement in South-South cooperation has expanded both in sectoral scope and scale and has seen the increase of bilateral and multilateral partnerships, in line with the patterns and trends referred to earlier in the overview of South-South cooperation within Latin America. A significant feature of contemporary development cooperation concerns the place of China, Jamaica's largest bilateral provider of financial and other forms of assistance, considered a global player but also a country with roots in the south. Another noteworthy trend is that in the current phase of South-South cooperation, Jamaica has worked to expand its own technical cooperation offers to other countries. There is general agreement that South-South cooperation has generated "fruitful and credible partnerships for Jamaica ... which have assisted in the achievement of a number of national priorities" (Miller, 2019).

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<sup>5</sup> The eleven beneficiary countries were Barbados, Belize, Costa Rica, the Dominican Republic, El Salvador, Guatemala, Haiti, Honduras, Jamaica, Nicaragua and Panama.

<sup>6</sup> Under the San José Accord, Venezuela and Mexico agreed to provide up to 160,000 barrels per day of crude oil and refined petroleum products to participating countries. Those two countries extended loan financing for between 20% and 30% of the fuel bills with a five-year repayment period and a portion of the deferred payments could be used by the beneficiaries to fund development projects. See SELA (2013).

### **C. The management and oversight of South-South cooperation in Jamaica: institutional arrangements for the initiation, implementation, management, monitoring and evaluation of South-South cooperation**

Two government institutions play key roles in initiating, coordinating, managing and implementing South-South cooperation programmes and projects in Jamaica. These are the Ministry of Foreign Affairs and Foreign Trade (MFAFT) and the Planning Institute of Jamaica (PIOJ). The Ministry of Foreign Affairs and Foreign Trade has an overall coordinating and advocacy role and handles the initial requests, offers and negotiation of agreements for South-South and triangular cooperation. South-South cooperation related matters are then handled by the Economic Affairs Department within the Multilateral Affairs Division, and by the Bilateral, Regional and Hemispheric Affairs Division and the Foreign Trade Division.

The institutional arrangements for South-South cooperation (negotiation of such cooperation arrangements) depend on the forum and the mechanism. Multilateral projects are mainly handled through the Multilateral Affairs Division. Generally, initial overtures take place via the Jamaican Permanent Mission to the United Nations in New York, which are then transmitted back to the Ministry of Foreign Affairs and Foreign Trade in Kingston and sent out to the relevant national agencies. Another important process that concerns multilateral cooperation is the fact that in the United Nations forums and within the context of the 2030 Agenda, countries can prepare voluntary national reviews describing their experiences with the implementation of this global agenda at the national level and present them at the High-level Political Forum on Sustainable Development. Jamaica participated in such a review in 2018. These exercises can also serve as catalysts for South-South cooperation or other offers of cooperation to strengthen capacity in various areas.

Bilateral cooperation is managed within the Ministry of Foreign Affairs and Foreign Trade by the Bilateral Relations Department. There are very structured arrangements for bilateral cooperation. Jamaica has several joint commissions for cooperation with various Latin American, Caribbean and African countries. They include joint commissions with Brazil, Botswana, Colombia, Costa Rica, Cuba, Ghana, Mexico, Nigeria, Panama and South Africa. The Commissions normally meet once every two years, with the meeting venues alternating between their respective countries, and they negotiate cooperation agendas and timelines for implementation over the following biennium. There are periodic prime ministerial visits and regular consultations between foreign ministers. This system has gained momentum during the last four years.

In such negotiations with partner countries, Jamaica seeks to observe the principle of complementarity, highlighting the areas in which it has capacity and is willing to offer technical cooperation. Some examples include tourism training and customer service, sports training, especially in track and field, and the organization and supervision of election processes.

The other key government agency is PIOJ, which was established in 1955, seven years before independence, as a technical planning unit. It is an agency that reports to the Ministry of Finance and Public Service. Two of its functions are to manage external cooperation agreements and programmes and to collaborate with external funding agencies in the identification and implementation of development projects. The External Cooperation Management Division (ECMD) is the designated directorate for this coordination, which manages, records and monitors all bilateral and multilateral cooperation projects and programmes on the basis of the agreements that have been negotiated and signed under the auspices of the Ministry of Foreign Affairs and Foreign Trade. South-South and triangular cooperation are not handled in a separate department, nor are they labelled with that nomenclature. There is no focal point for managing South-South cooperation projects separately. The PIOJ External Cooperation Management Division (ECMD) classifies cooperation programmes as either bilateral or multilateral.

Other less formal processes for initiating cooperation driven by the country's needs and the national agenda also exist. At times, the participation of government officials in multilateral knowledge-sharing platforms leads to the identification of expertise and a preliminary initiation of contacts for technical cooperation. Partner agencies, such as the Inter-American Development Bank (IDB) or the World Bank can be instrumental in providing details on good practice partnership locations for specific types of capacity-building. In seeking to formulate a specific type of development initiative, PIOJ may engage in observation missions, which aid in conceptualizing a programme suited to the local context that can then be submitted for the consideration of policymakers.

In the management and implementation of South-South and triangular cooperation projects, while PIOJ retains responsibility for oversight, monitoring and evaluation of the completed project, the focus shifts to the line ministries and sectoral agencies in which the particular initiative falls. PIOJ engages and works with a large network of public sector departments and agencies on development projects and programmes, including those that are supported by external cooperation.

## **D. Reporting of South-South cooperation and triangular cooperation in Jamaica**

Since 2015, the PIOJ External Cooperation Management Division (ECMD) has advanced in its efforts to systematically record and report on external cooperation that is registered through an agreement or memorandum of understanding (MOU) among the parties. Monetary values are recorded in cases where the cooperation has involved grant or loan financing and has been quantified by the contributing party. This is easier to track in cases of bilateral or multilateral cooperation in which there are official agreements concluded among the parties. However, there may well be cases of cooperation involving non-State actors, such as universities or non-governmental organizations, which are not recorded because they are not explicitly reported. Likewise, in many cases of technical cooperation involving the exchange of personnel or the facilitation of study tours, there is currently no methodology in place to record all the costs for all parties and measure the resource utilization and various development outcomes.

Since 2015, the Ministry of Finance and Public Service and PIOJ have been requiring that external partners provide quantitative data on technical cooperation. PIOJ also receives and responds to data requests from the Ibero-American General Secretariat (SEGIB) and other agencies that monitor South-South cooperation. Information on South-South cooperation and triangular cooperation is published in the annual *Economic and Social Survey Jamaica* under the heading of official development assistance (ODA).

However, collecting data on South-South cooperation is still a work in progress. No methodology has yet been developed that captures and measures all inputs and outcomes, or that can calculate the economic multiplier effect of experts and foreign professionals provided by technical cooperation and South-South cooperation initiatives. Likewise, there is no formula to estimate the social and economic welfare multiplier effect generated by South-South cooperation training programmes such as the Cuban Government's provision of 630 medical and other scholarships to Jamaica between 1976 and 2019.

A major example of South-South cooperation for Jamaica during the last fifteen years was Petrocaribe, a Bolivarian Republic of Venezuela-led regional cooperation programme in the energy sector, in which Jamaica

and 17 other Caribbean and Central American countries participated.<sup>7</sup> Petrocaribe provided substantial benefits by ensuring energy security at a time of economic difficulty and high international oil prices. It stimulated intra-regional trade flows and provided budgetary support and much needed funding for social protection programmes between 2006 and 2015.<sup>8</sup> However, the arrangement is not recorded as a development cooperation inflow in the annual *Economic and Social Surveys Jamaica* reports. On the contrary, because of the structure of the Petrocaribe programme, which is based on deferred payments on the delivery of petroleum products, it is recorded as debt financing in the national accounts of the period.<sup>9</sup>

Between 2005 and 2015, a significant part of the Bolivarian Republic of Venezuela's South-South cooperation with Jamaica revolved around the concessionary supply of petroleum products. The management of the development finance component of this cooperation was done by the Petrocaribe Development Fund (PDF), established by the Ministry of Finance through an amendment of the Petroleum Act in 2006. PDF had four major objectives:

- (i) To repay Jamaica's debt to the Bolivarian Republic of Venezuela through good stewardship and investment of that portion of the oil price not paid up front.
- (ii) To protect Jamaica's energy security by ensuring adequate financing for oil imports and petroleum products.
- (iii) To provide budgetary support to the government during a difficult economic period.
- (iv) To utilize 7% of the annual surplus for social protection and social development grants.<sup>10</sup>

Table IV.1 below displays information from the annual reports of the Petrocaribe Development Fund from 2010 to 2015 on the Fund's loan and grant disbursements for budgetary support, capital development projects and social development during those years.

<sup>7</sup> In addition to the Bolivarian Republic of Venezuela, the following countries were signatories of, or later, acceded to the Petrocaribe Energy Cooperation Agreement, signed in Puerto de la Cruz, Bolivarian Republic of Venezuela, on 29 June 2005: Antigua and Barbuda, the Bahamas, Belize, Cuba, Dominica, the Dominican Republic, El Salvador, Grenada, Guatemala, Guyana, Haiti, Honduras, Jamaica, Nicaragua, Saint Kitts and Nevis, Saint Lucia, Saint Vincent and the Grenadines and Suriname. Some countries did not follow-up with a bilateral, country-specific agreement with the Bolivarian Republic of Venezuela, e.g. the Bahamas and Saint Lucia. Honduras's participation was suspended in 2009 and renewed in 2012. Between 2013 and 2014, Honduras, Guatemala and El Salvador explored the possibility of joining Petrocaribe but had withdrawn their applications by the end of 2014. See *CentralAmericaData* (2013 and 2014).

<sup>8</sup> Author's interview with the Executive Director of the Petrocaribe Development Fund (PDF) in Jamaica on 16 July 2014. For more details on Petrocaribe, see Jamaica Information Service (2005). Useful information can also be found in OLADE (2014).

<sup>9</sup> For a comprehensive empirical economic analysis of the sustainable development effects of Petrocaribe, see Jardon, Kuik and Tol (2019).

<sup>10</sup> Author's interview with Executive Director, Petrocaribe Development Fund, Kingston, 16 July 2014.

Table IV.1

**Petrocaribe Development Fund Disbursements to Government of Jamaica, 2010–2015**

| Period    | Fund's loan and grant disbursements  | Source   |
|-----------|--|--|
| 2010/2011 | US\$ 201.2 million being approved to finance development projects in several public entities.  | Petrocaribe Development Fund Annual Report 2010/2011 – 2011/2012 |
| 2011/2012 | US\$ 524.6 million was made available to the Ministry of Finance and other public entities for budget support and the financing of development activities, while social development grants amounting to US\$ 4.6 million were disbursed. | Petrocaribe Development Fund Annual Report 2010/2011 – 2011/2012 |
| 2013/2014 | Loans of US\$ 624.74 million to the Ministry of Finance and other public sector entities, and US\$ 1.68 million in grants for social development projects.   | Petrocaribe Development Fund Annual Report 2013/2014             |
| 2014/2015 | Loan disbursements of US\$ 250 million to the Ministry of Finance, US\$ 11.68 million to various development projects, and grant funding of US\$ 4.95 million for social development projects.   | Petrocaribe Development Fund Annual Report 2014/2015             |

**Source:** Prepared by the authors, on the basis of Petrocaribe Development Fund (PDF), *Annual Reports 2010/2011, 2011/2012, 2013/2014, 2014/2015*.

The failure to explicitly include Petrocaribe concessionary oil financing and provision of development finance may be related to the broader debate in South-South cooperation policy circles and technical and academic literature concerning reimbursable financial cooperation.<sup>11</sup> It may also reflect the fiscal austerity regime in Jamaica between 2013 and 2019 during the IMF EFF and stand-by arrangement, the Bolivarian Republic of Venezuela's growing economic challenges and the increasingly uncertain prospects for Petrocaribe, which was suspended by 2016.<sup>12</sup>

Likewise, there are no data available on Jamaica's provision of counterpart financing for technical assistance and training in a number of South-South cooperation programmes, and currently there are no procedures or formulas in place to record and calculate the opportunity costs and related expenditure involved in providing Jamaican experts to other South-South cooperation partners during exchanges. The challenges include the capacity constraints faced by small units with limited human resources to embark on such data collection, analysis and reporting tasks. These challenges were magnified during the past six years by the constraints of meeting the quarterly reporting requirements of the IMF EFF and the six-monthly reporting timelines for the stand-by arrangement.

The table below provides a listing of the main South-South and triangular cooperation initiatives involving Jamaica, with a focus on the period from 2013 to 2019. Additionally, due to the significance of this programme in the overall evolution of South-South cooperation in the Caribbean region, there is reference to the Bolivarian Republic of Venezuela-Jamaica Petrocaribe cooperation between 2005 and 2015.

<sup>11</sup> See Domínguez Martín (2015).

<sup>12</sup> The Petrocaribe Development Fund also came to an end in the ensuing years. The Petroleum (Amendment) Act of 2019 transferred the rights and obligations of the PDF to the Government of Jamaica (Smith, 2019).

**Table IV.2**  
**South-South cooperation and triangular cooperation initiatives involving Jamaica**

| Role of Jamaica   | Partner(s)   | Types of cooperation    | Details   | Value  |                         |   |              |
|---|--------------|-------------------------|---|--|-------------------------|---|--------------|
| Beneficiary   | Brazil       | South-South cooperation | 2013 Technical/Vocational Skills Training Centre in Jamaica         | US\$ 58,084  |                         |   |              |
| Beneficiary   | China        | South-South cooperation | 2014 Loan; economic infrastructure                                  | US\$ 121.8 million   |                         |   |              |
|   |              |                         | 2014 Scholarships   | US\$ 568,271   |                         |   |              |
|   |              |                         | 2015 Loans/grants; economic infrastructure                          | US\$ 34.8 million (disbursed)<br>US\$ 15.9 million (new grant) |                         |   |              |
|   |              |                         | 2015 Scholarships   | US\$ 3.73 million  |                         |   |              |
|   |              |                         | 2016 Loans/grants; Social infrastructure; economic infrastructure   | US\$ 45.2 million  |                         |   |              |
|   |              |                         | 2016 scholarships   | US\$ 3.36 million  |                         |   |              |
|   |              |                         | 2017 Loans/grants<br>Economic infrastructure; social infrastructure | US\$ 81.4 million (disbursed)<br>US\$ 366.4 million (new)      |                         |   |              |
|   |              |                         | 2017 scholarships   | US\$ 3.98 million  |                         |   |              |
|   |              |                         | 2018 Loans/grants<br>Economic infrastructure; social infrastructure | US\$ 122.2 million (disbursed)<br>US\$ 9.9 million (new)       |                         |   |              |
|   |              |                         | 2018 scholarships   | US\$ 3.2 million   |                         |   |              |
|   |              |                         | Beneficiary   | Cuba   | South-South cooperation | Bilateral Scholarship programme 2018                                    | US\$ 281,860 |
|   |              |                         |   |  |                         | 163 Cuban health professionals and teachers deployed to Jamaica in 2018 | Value N/A    |
|   |              |                         |   |  |                         | Eye Care programme 2005–2018  | Value N/A    |
| Bilateral scholarship programme 2017  | US\$ 465,680 |                         |   |  |                         |   |              |
| 192 health and education Cuban professionals 2018   | Value N/A    |                         |   |  |                         |   |              |
| Bilateral Scholarship programme 2016  | US\$ 364,900 |                         |   |  |                         |   |              |
| 100 Cuban health and education professionals 2016   | Value N/A    |                         |   |  |                         |   |              |
| Bilateral Scholarship programme 2015  | US\$ 300,480 |                         |   |  |                         |   |              |
| 73 health and education professionals 2015  | Value N/A    |                         |   |  |                         |   |              |
| Bilateral Scholarship programme 2014  | US\$ 257,680 |                         |   |  |                         |   |              |
| N.B. Since 1976, approximately 1500 Cuban health professionals have served in Jamaica; 2005–2009, 4407 Jamaicans received eye surgery in Cuba; 2010–2018, 19,530 eye operations were carried out on Jamaican patients at Cuban-staffed eye hospital in Jamaica; 630 Jamaicans have received scholarships and graduated from Cuban universities, of whom 324 have graduated as medical professionals. 400 Cuban teachers have served in primary, secondary and tertiary education establishments in Jamaica since 1998 |              |                         |   |  |                         |   |              |

Table IV.2 (continued)

| Role of Jamaica | Partner(s)   | Types of cooperation    | Details  | Value              |
|-----------------|--|-------------------------|--|--------------------|
| Beneficiary     | India  | South-South cooperation | India Technical and Economic Cooperation (economic infrastructure) 2014  | US\$ 2.1 million   |
| Beneficiary     | Mexico   | South-South cooperation | Jamaica-Mexico Binational Commission established 1993. Areas of support: agricultural technology; roads; environment; water engineering and irrigation; security; nautical mapping; disaster prevention; archives management; 2015 | US\$ 1.8 million   |
|                 |  |                         | 2016   | US\$ 43,250        |
|                 |  |                         | 2017   | US\$ 20,000        |
|                 |  |                         | 2018   | US\$ 62,700        |
| Beneficiary     | Nigeria  | South-South cooperation | 2018, 2019 Nigerian Technical Aid Corps professionals in Jamaica: medical personnel, tourism development, cultural industry exchanges  | Monetary value N/A |
| Beneficiary     | Jamaica-Japan-United Nations Development Programme (UNDP)                    | Triangular cooperation  | 2015/2017 Climate Change Partnership   | US\$ 600,000       |
| Beneficiary     | Jamaica-Food and Agriculture Organization of the United Nations (FAO)-Brazil | Triangular cooperation  | 2015/2017 Agricultural production/food security/school feeding programme, related study tours to Brazil  | US\$ 37,000        |
| Beneficiary     | Jamaica-United Nations Development Programme (UNDP)-Brazil                   | Triangular cooperation  | 2014 Cooperation to establish framework for coordinating poverty reduction policy and programme and social protection  | Monetary value N/A |
| Beneficiary     | Jamaica/Brazil/Inter-American Development Bank (IDB)/Ecuador/Peru/Chile      | Triangular cooperation  | 2014 Study tours, capacity-building in child protection within local government framework  | Monetary value N/A |
| Beneficiary     | Jamaica/Organization of American States (OAS)/Brazil                         | Triangular cooperation  | 2018 Scholarships  | US\$ 98,462        |
| Beneficiary     | Jamaica/Organization of American States (OAS)/China                          | Triangular cooperation  | 2018 Scholarships  | US\$ 54,325        |
| Beneficiary     | Jamaica/Organization of American States (OAS)/Chile                          | Triangular cooperation  | 2018 Scholarships  | US\$ 32,887        |

Table IV.2 (concluded)

| Role of Jamaica | Partner(s)   | Types of cooperation    | Details  | Value   |
|-----------------|--|-------------------------|--|---|
| Beneficiary     | Jamaica/ Mexico/ United Nations Children's Fund (UNICEF)   | Triangular cooperation  | 2020 Evaluation of multidimensional poverty programmes   | Monetary value N/A  |
| Beneficiary     | Jamaica/ Cuba/ United Nations Development Programme (UNDP)/ Caribbean Risk Management Initiative (UNDP/CRMI) | Triangular cooperation  | Disaster Risk Reduction Best Practice Capacity Development 2013  | Monetary value N/A  |
| Contributor     | Jamaica/Belize/ Saint Lucia  | South-South cooperation | Capacity-building for social protection programmes   | Monetary value N/A  |
| Contributor     | Jamaica/ CARICOM Secretariat/ Caribbean Community (CARICOM) member States                                    | South-South cooperation | Training in results-based management for conducting survey of living conditions  | Monetary value N/A  |
| Contributor     | Jamaica/ Caribbean Community (CARICOM)/ other developing countries   | South-South cooperation | Training activity: How to qualify for and access Climate Change financing  | Monetary value N/A  |
| Contributor     | Jamaica/ Caribbean Community (CARICOM) member States/other developing countries                              | South-South cooperation | Training activities in Sports development, electoral supervision and tourism development   | Monetary value N/A  |
| Beneficiary     | Venezuela (Bol. Rep. of) 2005–2015   | South-South cooperation | Petrocaribe programme 2005–2015, delivery of energy products on concessionary terms, provision of access to development funding and budgetary support through the Petrocaribe Development Fund, stimulation of South-South trade through exchange of oil for clinker exports | See table IV.1 above for Petrocaribe Development Fund support 2010–2015 |

**Source:** Prepared by the authors, on the basis of United Nations Development Programme (UNDP), *Sharing What Works: South-South Cooperation for Disaster Risk Reduction in the Caribbean*, Panama City, 2014; Planning Institute of Jamaica (PIOJ), *Economic and Social Survey Jamaica*, Kingston, 2014, 2015, 2016, 2017 and 2018; Planning Institute of Jamaica (PIOJ), "South-South cooperation initiatives from which Jamaica is benefiting", March 2019; interviews with Planning Institute of Jamaica officials, Ministry of Foreign Affairs and Foreign Trade officials, Ambassadors of Cuba and Mexico, Kingston, 25–29 November 2019; Petrocaribe Development Fund (PDF), *Annual Reports 2010/2011, 2011/2012, 2013/2014, 2014/2015*.

Additionally, in March 2020, a Cuban medical brigade composed of 140 health workers travelled to Jamaica to assist in dealing with the COVID-19 pandemic. The team contains 78 doctors and nurses with previous third-country medical mission experience. Also in March 2020, Cuba and Jamaica signed a new Bilateral Technical Cooperation Agreement in the field of health that renews their existing cooperation agreement for a three-year period (MINREX, 2020a and 2020b).

## **E. Main advances, challenges and lessons learned**

### **1. Advances**

The overview of the Jamaican experience of South-South and triangular cooperation reveals that the country has built up an extensive network of South-South cooperation and triangular cooperation partners in the Asia-Pacific region, including China, India and Japan. In Latin America and the Caribbean, its South-South cooperation partners have included the Bolivarian Republic of Venezuela, Brazil, Chile, Colombia, Cuba and Mexico. In Africa, Jamaica has established bilateral commissions with Botswana, Ghana, Nigeria and South Africa and bilateral cooperation initiatives are gradually being developed or renewed with these countries. The monetary value attached to most South-South cooperation projects is relatively small when compared to bilateral or multilateral resource flows from developed countries. However, it should be noted that China has accounted for the largest share of financial support accruing to Jamaica from bilateral partners since 2013 and has provided significant inflows of technical and economic cooperation dating back to the first years of the twenty-first century. The value of the Chinese loan portfolio in 2013 was US\$ 1.0 billion, destined mostly for the country's major infrastructure development programme.<sup>13</sup>

South-South cooperation goes well beyond financial flows, notwithstanding the importance of the latter (Dominguez Martín, 2015; Ibero-American Programme to Strengthen South-South Cooperation/SEGIB, 2016). Key objectives of South-South cooperation include the provision of mutual support for countries' development efforts through institutional strengthening, knowledge-sharing and capacity- and resilience-building. The impact of South-South cooperation in Jamaica is highly visible and more easily quantifiable in certain sectors, including health, energy, the stimulation of certain areas of regional trade and social

<sup>13</sup> PIOJ (2014); PIOJ, *Economic and Social Survey Jamaica*, excerpts 2014–2018 prepared for the author by the PIOJ External Cooperation Management Division, on multilateral and bilateral inflows of official development assistance (ODA); Bernal, 2016.

policy capacity-building. Initiatives in these and other areas are expected to make a significant contribution to the country's realization of the 2030 Agenda in the context of the decade of action to achieve all the SDGs in the remaining 10 years.

Jamaica has an emerging role as a provider of South-South cooperation, primarily in the regional context. Jamaican officials are cognizant of both the challenges and the opportunities of being classified as a middle-income country. On the one hand, the country still has severe environmental, social and economic vulnerabilities and is frequently hit by disasters. Like Barbados and many Caribbean SIDS, the middle-income classification excludes Jamaica from most sources of concessional development financing (Miller, 2019). On the other hand, it has also stimulated greater interest in the potential of South-South partnerships for economic cooperation and non-traditional, innovative financing modalities. Middle-income status and the country's efforts to manage its challenges may also offer greater visibility and opportunities for networking and showcasing strengths and areas of good practice, some of which have been highlighted by multilateral agencies such as the World Bank.<sup>14</sup> Finally, the joint initiative of Canada, Jamaica and the United Nations Secretary-General in 2020 to mobilize new sources of development financing may lead to further South-South cooperation and may also provide greater support for middle- and high-income small developing countries like Jamaica that have heavy debt burdens and are deeply vulnerable to external shocks. The recent election of Jamaica as vice-chair of the Committee on South-South Cooperation of the Economic Commission for Latin America and the Caribbean (ECLAC) for the next two years also promises to give more visibility to the specific needs of the country and the Caribbean as a whole.

## 2. Challenges

A large part of South-South cooperation (technical cooperation and knowledge exchanges) will remain unquantifiable unless appropriate methodologies are developed or adapted from elsewhere for use in the Jamaican context. Activities such as the collection, recording and analysis of data and calculation of resource inflows and expenditure are still limited, although PIOJ and the Ministry of Finance and Public Service have made concerted efforts to strengthen and expand them since 2015. The activity resulting from formal bilateral or multilateral arrangements is recorded only if it involves the explicit commitment of financial resources and if the information is made available by the partner countries or institutions. Currently, there are

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<sup>14</sup> One case would be the World Bank's designation of Jamaica's Programme of Advancement through Health and Education (PATH) conditional cash transfer programme, intended to support the health, nutrition and educational development of children in low income families, as an example of good practice.

no other channels for collecting such data or for analysing the impact of the cooperation within the country. The value of professional expertise and human resource development contributed through South-South cooperation exchanges is not fully quantified, nor have any statistical indicators or formulae been developed to calculate the multiplier effects of such expertise on the performance of the country's health and education services or other sectors. One way to begin addressing these gaps might be to engage in consultations and capacity-building exercises with other Latin American and Caribbean States, some of which have been developing their national information and measurement systems on South-South cooperation over the last decade or more.<sup>15</sup>

Another information gap arises with the issue of cost sharing. Jamaica participates in South-South cooperation generally on a cost-sharing basis. Examples of this include Jamaica's future cooperation with Mexico, where cost-sharing will commence with the new cycle of bilateral cooperation in 2020–2021, and Cuba, where Jamaica contributes stipends for its students studying on scholarships in Cuba and covers travel, housing and salaries for Cuban health and education professionals assigned to the country. The budgetary data involved in such cost-sharing exercises and in Jamaica's provision of technical cooperation to other countries is not explicitly recorded and published in the annual *Economic and Social Survey Jamaica*. It may, however, be available in the budget estimates of the relevant line ministries and government agencies. Specifically in cases where Jamaica provides technical cooperation to other partners, a starting point for quantifying the basic costs of the cooperation might require calculating basic inputs such as duration of training, transport and per diem costs, insurance costs and the salary details of the consultant.<sup>16</sup> By far the most complex conceptual challenge might be to develop a methodology for estimating the intangible value of participating in South-South cooperation exchanges. The beneficial elements constituting this value might include knowledge sharing/knowledge gained, network building, greater international visibility and access to new resources, including innovative practices, approaches and technology.

In conclusion, the issues related to South-South cooperation include Jamaican institutions' challenges in tracking all technical cooperation activity and in comprehensively quantifying and recording resource inputs, outputs and impact, which would more fully represent the value of South-South cooperation. Despite the impressive achievements of PIOJ

<sup>15</sup> Ibero-American Programme to Strengthen South-South Cooperation/SEGIB (2016) contains interesting case studies drawn from Brazil, Chile and Mexico.

<sup>16</sup> See Ibero-American Programme to Strengthen South-South Cooperation/SEGIB (2016), where various elements of such a methodology appear to have been used in the Brazilian and Mexican case studies.

and the Ministry of Foreign Affairs and Foreign Trade, they have small units and a limited number of professionals who are constantly challenged by the volume of work and the demands placed on their scarce resources. There is a high turnover of public sector personnel which can lead to a loss of institutional memory. It also slows down the development and consolidation of systems and procedures.

### **3. Lessons learned**

Jamaica has a history of strong partnerships with many Latin American and Caribbean countries, and also with developing country partners in Africa and Asia. The number and frequency of its engagements with Latin American and Caribbean countries have increased steadily since the early 1990s in line with the establishment of regional organizations and cooperation initiatives in Latin America and the Caribbean. South-South cooperation has been prominent in the areas of health, education, other areas of social policy, energy security, agricultural development, cultural development, security, climate change mitigation, natural disasters and resilience-building. Jamaica's most significant experiences of South-South cooperation in the Latin America and the Caribbean region—in terms of duration, scope and scale of the cooperation, the evolution of structured arrangements and the forging of strategic alliances with multilateral organizations—have been with the Bolivarian Republic of Venezuela, Cuba and Mexico.

Joint commissions are the major mechanism employed for the governance of bilateral South-South cooperation partnerships. They function as effective instruments for regular review and joint evaluation of the cooperation and they facilitate consultative approaches to decision-making in each new bilateral South-South cooperation cycle. A case in point is the Jamaica-Mexico Binational Commission, which is now into its ninth consecutive triennial cycle.<sup>17</sup>

A key role can be played by multilateral agencies that act as lynchpins in stimulating and supporting triangular cooperation. The United Nations development system, the IDB and the World Bank have been instrumental in the Jamaican case. Likewise, the 2030 Agenda multilateral processes and the Jamaican Government's alignment of its Vision 2030 National Development Plan with the SDGs have increasingly influenced the focus of many South-South cooperation programmes. One cogent example of this is Jamaica's cooperation with Cuba, which focuses on capacity- and resilience-building in health and education. Jamaica has been working with the United Nations, including ECLAC, on capacity-building in data

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<sup>17</sup> Interview with H.E. Juan José González Mijares, Ambassador of Mexico to Jamaica, 29 November 2019.

collection and monitoring and evaluation systems to track its progress towards achieving its 2030 Agenda SDG targets.

South-South cooperation may at times suffer from implementation challenges, which include delays in submitting final reports and glitches in monitoring and evaluation. On the other hand, the value of strong local leadership should be stressed for good implementation of South-South cooperation, and there are outstanding examples within Jamaican ministries and agencies that should be replicated.

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## **Annex IV.A1**

### **Methodology**

Jamaica, which became independent in the 1960s, is classified as a upper middle-income economy by the World Bank. With extensive relations and partnerships with its regional and hemispheric neighbours, Jamaica has one of the longest histories of engaging with South-South cooperation in the Caribbean. Its foreign policy and diplomacy have embraced relations with other Southern partners since the 1970s. The country has faced multiple socioeconomic development challenges and has approached South-South cooperation as a valuable source of technical cooperation, peer-to-peer learning, and an opportunity to both access and share innovative ideas and development support. Jamaica is also noted for its institutional capacity in the sphere of social and economic planning, data collection and monitoring, as well as its strong diplomatic presence in multilateral development forums.

The research process involved four phases. First, preliminary scoping interviews were held with senior government officials in the ministries of foreign affairs, finance, and planning related portfolios in both countries to ascertain the feasibility of undertaking these two case studies, and their commitment to provide support for further field research. The second phase of the research involved extensive desk-based information searches on the historical emergence of South-South cooperation and the academic and policy debates that have influenced its evolution, as well as on the South-South cooperation profiles of the two country case studies. Data collection has not relied solely on desk-based research, but also on a combination of documentary research and interviews conducted with government officials in key institutions and agencies concerned with managing South-South cooperation in the respective countries, as well as academics, and representatives of Latin American countries who are leading South-South cooperation processes in Jamaica. Civil servants from key international organizations that play supporting roles vis-à-vis South-South or triangular cooperation in the two countries were also interviewed. In the third phase of the research, ten days were spent between the two countries in order to conduct interviews and collect documentary evidence. There was a limited amount of country-specific South-South cooperation data available digitally for each country, therefore the fieldwork proved to be invaluable. The final phase of the research was devoted to analysing the material that had been collected.

## Chapter V

# Evaluating South-South cooperation: the case of Paraguay

*Paola Vaccotti Ramos*<sup>1</sup>

## Introduction<sup>2</sup>

Paraguay is a landlocked country whose greatest wealth is its natural resources. Particularly notable are its water resources, since Paraguay has numerous rivers and is situated atop one of the world's largest known reserves of fresh water: the Guaraní aquifer. Being landlocked requires it to forge regional links so it can open up to the world and to its markets.

Prior to the current conception of South-South cooperation, there were milestones that could be considered precursors of Paraguayan cooperation. From the beginning, the country was part of several of the organizations created for cooperation purposes in the Americas, such as

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<sup>2</sup> The assistance of the historian David Velázquez Seiferheld with this section is gratefully acknowledged.

the Pan American Union (the forerunner of the Organization of American States, OAS) and its subsidiary bodies. It signed agreements at the earliest stages of that process, such as the 1902 accord to coordinate activities between the police forces of the American States. It was also involved in collective cooperative efforts, such as those made in response to the 1918 influenza pandemic (the so-called Spanish flu).

After the Second World War and in the early years of the Cold War, Paraguay was one of the first countries to receive cooperation from the World Bank —then styled the International Bank for Reconstruction and Development (IBRD)— to contain inflation and stabilize its currency. It also received cooperation from the United States, through its cooperative services, the work of which was continued by the United States Agency for International Development (USAID). Finally, it received funding from the Alliance for Progress.

Paraguay, together with the Plurinational State of Bolivia and Uruguay, formed the Urupabol Commission international bloc in 1963 to coordinate their representation on the Board of Directors of the Inter-American Development Bank (IDB) and other international financial organizations. The Commission also worked to bolster commercial, cultural, artistic and scientific exchanges among its member countries, to improve the navigability of their rivers and to harmonize their waterways laws, to improve road, rail, river, air and telecommunications interconnections and to study projects and pursue other undertakings of common interest.

A key geopolitical milestone in Paraguay's bilateral cooperation with its neighbours was the 1973 signing of agreements with Brazil and Argentina to build, respectively, the Itaipú and Yacyretá binational dams. This granted Paraguay co-ownership of the largest dam in the world and the ability to produce clean, renewable and non-polluting energy on a large scale.

In 1991, through the Treaty of Asunción, Paraguay was involved in the creation of the Southern Common Market (MERCOSUR). Over the following 30 years, Paraguay has made significant progress through its participation and exchanges within MERCOSUR. That integration has contributed to the consolidation of its democratic process and, in addition, has strengthened its civil service administrative cadres and the competitiveness of its national productive apparatus (MERCOSUR, 2020). Cooperation among the bloc's members is very active, but it does not take place under a bloc-wide coordination mechanism for South-South cooperation; instead, it is based on bilateral relations.

The partnership between Paraguay, the Plurinational State of Bolivia and Uruguay (the Urupabol Commission of 1963) regained importance for the three countries in 2014 with the design of a project to transport liquefied natural gas (LNG) along the Paraguay-Paraná waterway. This waterway runs from Puerto Cáceres in the Brazilian State of Mato Grosso to the port of Nueva Palmira in the Uruguayan Department of Colonia. There, the River Paraná joins the River Uruguay and, together, they flow into the Atlantic Ocean through the River Plate estuary. The waterway —at 3,442 km, one of the world’s longest— traverses five countries: Argentina, Brazil, Paraguay, the Plurinational State of Bolivia and Uruguay. It connects more than 20 cities and is an important corridor for exports and imports. However, its importance for the economy of Paraguay goes beyond that: more than 90% of cargo in the area travels under the Paraguayan flag, and Paraguayan-flagged river fleet is the third largest in the world (Ministry of Foreign Affairs, 2020) after those of the United States and China.

## **A. South-South cooperation in Paraguay: an institutional framework working to strengthen itself**

Paraguay has been a cooperation recipient for decades. It has also long shared knowledge and successful experiences with other countries. However, awareness of its role as a provider of cooperation is a more recent phenomenon.

In 2011, in line with the principles of the Paris Statement, the Government of Paraguay took steps to improve its communication channels with donors. In 2016, this undertaking was developed further through a presidential decree that created an inter-agency coordination mechanism between the Ministry of Finance, the Technical Planning Secretariat for Economic and Social Development (STP) and the Ministry of Foreign Affairs for managing non-reimbursable international cooperation.<sup>3</sup> As part of the process, those three entities were designated as the responsible parties and channels for official dialogue with cooperation partners. Two modalities were established: (i) financial cooperation (multilateral, bilateral, triangular or South-South), covering financial resources granted on a non-reimbursable basis, and (ii) non-financial cooperation, i.e. aid received in the form of technical, technological, knowledge, skills or experience transfers, including exchanges experts and volunteers, scholarships, infrastructure and equipment. In addition, the responsibilities of each of the entities were defined, along with their roles within the Inter-agency Technical Committee. It was further decided that meetings should be held with the cooperation partners present in Paraguay at least twice a year, in order to: (i) report on the demand for cooperation in the country, (ii) report on the

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<sup>3</sup> Presidential Decree No. 6159/2016.

offers of cooperation available, (iii) communicate the government's policy on non-reimbursable cooperation, (iv) receive proposals from cooperation partners, and (v) maintain a formal dialogue on behalf of the government using the most appropriate channels.

In addition, the decree established the strategic steps for the approval of non-reimbursable cooperation and ruled that STP would be responsible for maintaining a publicly accessible information system on non-reimbursable international cooperation, which can be found on the Secretariat's website under "cooperation partner map".

Since the entry into force of this presidential decree, the exchange of information on cooperation processes (both incoming and outgoing) has been more fluid among the three State agencies involved. Cooperation offers are identified and registered actively, since STP and the Ministry of Foreign Affairs consult with other entities to ensure the updating of the Republic of Paraguay's Catalogue of Technical Cooperation Offers. This catalogue was first published in 2017 and is constantly reviewed and updated. However, efforts are still needed to strengthen institutional understanding—at the micro (within each institution) and macro (government-wide) levels—of the importance of publicizing the cooperation available, with the consequent global positioning of Paraguay as a country with accumulated experience that can be shared and replicated. That understanding must also go beyond the executive and be embraced by the other branches of government.

This strengthening of institutional understanding must be accompanied by a corresponding allocation in each institution's budget. Part of the exchange that occurs in the cooperation offered has to do with the coverage of administrative and operational costs, and this is a problem that affects the finalization of offers, especially in distant regions, which entails an increase in costs.

The Paraguay 2030 National Development Plan, which is currently being revised and updated, includes Paraguay's adequate insertion into the world as a third strategic axis. Its objective is to position and improve the country's image, strengthen national participation in international forums, promote the allocation of resources to expand economic integration and bolster ties that can contribute to the adoption of technology and knowledge. However, an analysis of both the diagnosis and the strategies of the axis reveals that South-South cooperation is not explicitly included in any of its modalities, although reference is made to various situations in which the country must interact with its peers.

High-level national technical staff actively participate in various forums for cooperation dialogue and exchange, with an emphasis on

South-South cooperation. Notable in this regard is the venue established by the Ibero-American General Secretariat (SEGIB) through its Ibero-American Programme for the Strengthening of South-South Cooperation (PIFCSS). This programme involves activities to assess South-South cooperation, as well as possible methods and indicators, and it provides updated information that feeds into an annual regional systematization of this type of cooperation. This has encouraged domestic efforts to collect information and evaluate good practices that the Paraguayan institutions believe could be shared.

In the agencies engaged with international cooperation —particularly the Ministry of Foreign Affairs, the Ministry of Finance and STP— clarity exists at the technical level about the benefits and advantages of positioning Paraguay as a provider of quality technical cooperation, as well as about the specific role of South-South cooperation. The challenge is for decision-makers to embrace the conceptualization of this type of cooperation and strengthen it institutionally as an area where Paraguay can benefit by playing its dual role as a recipient and a provider of cooperation. The designing of a national cooperation policy, accompanied by a budget, could offer an opportunity for broadening the scope of the Paraguay 2030 National Development Plan and consolidating that dual role.

## **B. Paraguay's cooperation offerings**

Between 2010 and 2011, STP began to keep records of cooperation experiences, essentially at the request of the joint commissions for international cooperation. However, the systematization of the national cooperation offerings in the 2017 Catalogue was the milestone in the formalization of Paraguay's technical cooperation, in that it increased the internal —and, most especially, external— visibility of its activities as a provider.

In retrospect, there were situations in which different good practices in the country were shared with others but were not systematized as South-South cooperation, given the absence of the theoretical construct, of channels for doing so and of the relevant indicators. For example, the Itaipú hydroelectric plant has been receiving professionals from different parts of the world for decades, with whom experiences in the production of clean energy are shared. In turn, the Ministry of Agriculture and Livestock has accumulated knowledge on bovine genetics that has been shared with other countries, but scant records were kept.

There are other noteworthy experiences, such as the conditional money transfers made by the Ministry of Social Development to the beneficiaries of the Tekoporã anti-poverty programme by means of mobile phone virtual wallets. This mechanism has been shared with Angola, El

Salvador and Honduras. Paraguay also has pioneering experience in vote counting, through its TREP mechanism for the transmission of preliminary electoral results. This is an informal, non-binding information system, which assists in making election results transparent and allows the rapidest possible publication of preliminary results. The system has been used in several countries that were privately advised by technicians from the Paraguayan electoral justice system. It meets all the characteristics for inclusion among the forms of South-South cooperation that the country can officially offer.

In addition to the experiences outlined above, there are other good practices that are currently being consolidated and that, in the near future, could be shared with other countries. Unquestionably, the Paraguayan technical cooperation offering that has been best received in recent years is the System for Monitoring Recommendations (SIMORE), which is seen as the most successful product for its reach in terms of both cooperation opportunities and recipient countries.

At the same time, in the area of multi-stakeholder cooperation, in September 2019 the partnership between the Ministry of Foreign Affairs and the non-governmental organization Fundación Paraguaya was formalized. Its goal is to consolidate Paraguay's role as a provider of international cooperation through the Fundación Paraguaya programmes that are already shared with other countries: for example, the Poverty Elimination Stoplight, self-sustainable schools, entrepreneurial education and microfinance with a social focus.<sup>4</sup>

## The Recommendations Monitoring System

The Recommendations Monitoring System (SIMORE) is an inter-agency mechanism to systematize the international human rights recommendations served on Paraguay by the various United Nations and OAS human rights bodies and special procedures. SIMORE also allows access to updated information on the actions taken by State institutions to implement those recommendations. The system has been shared with Chile, Uruguay, the Dominican Republic, Honduras, Argentina and Costa Rica.

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<sup>4</sup> Since 1985, Fundación Paraguaya has been a pioneer in microfinance and entrepreneurship initiatives in Paraguay. Its working strategies are centred on the creation and strengthening of individual, collective and institutional capacities with a view to eliminating poverty. Its role as a provider of technical cooperation began in 2004, with activities in more than 20 countries. The partnership between the Ministry of Foreign Affairs and Fundación Paraguaya established in the last quarter of 2019 will expand the supply of South-South cooperation with numerous actors in the country. Fundación Paraguaya's programmes will be incorporated into this framework through a public-private partnership that will position the country's social products brand to contribute to the fight against poverty. Its objective is to promote and pursue Fundación Paraguaya's social innovation programmes, as well as to undertake joint actions and coordinate both organizations' cooperation efforts at the international level.

SIMORE arose from the need to submit the Universal Periodic Review (UPR) in a timely and correct manner, in order to optimize the efforts of national officials. UPR is a mechanism established by the United Nations Human Rights Council with the aim of improving the human rights situation in each of the 193 United Nations member countries. Within its framework, the human rights situations of all the Member States are reviewed. The outcome of each review is recorded in a final report with recommendations that the State under review is expected to implement before the next review.

Paraguay's first UPR report took a year of discussions, data collection and exchanges between officials from various national institutions, which resulted in an overload of work and an inefficient use of time. In 2016, Paraguay's second UPR was due. On that occasion it decided to use SIMORE and, as a result, only four months of work were required, the workload was optimized and a complete, good quality report was produced. From the outset, the tool's development received technical support from the United Nations Development Programme (UNDP) and the United Nations High Commissioner for Human Rights in Paraguay.

The second version, known as SIMORE Plus, added the possibility of aligning the recommendations with the Sustainable Development Goals (SDGs). This further expanded the tool's capacity as a programming mechanism for the design, planning and evaluation of public policies. In addition to being a platform for transmitting human rights recommendations, SIMORE is a mechanism that allows for the systematic interconnection of all agencies engaged in the field of human rights in the country.

One of the most significant achievements with the system is its transfer by Paraguay to become the new Inter-American SIMORE, operated by the Inter-American Commission on Human Rights (IACHR) since June 2020. In a number of international forums, several Asian and African countries have expressed their interest in SIMORE. However, some budgetary constraints still need to be addressed in order to establish cooperation with those countries outside the region. Also pending is an evaluation of the impact of the tool's use at the national level and in countries that have already adopted it as recipients of South-South cooperation.

The current inclusion of the 2030 Agenda for Sustainable Development in the State's actions represents an opportunity to expand the use of the SIMORE Plus tool at the national level. This system allows international commitments and recommendations to be linked with the implementation of the SDGs and, in addition, it is also an opportunity to offer South-South cooperation.

### **C. Conceptualization and construction of South-South cooperation assessment in Paraguay**

Once the concept of South-South cooperation has been recognized and accepted, one of the main issues the countries of the global South need to address is its evaluation. This type of cooperation is not based on the Paris Statement and its functioning is governed by mutual trust and policies agreed on between the parties, with a strong regional perspective. At the regional and Ibero-American levels, forums for further reflection have been created, most notably by the Economic Commission for Latin America and the Caribbean (ECLAC) and SEGIB. The second High-level United Nations Conference on South-South Cooperation (BAPA+40) also contributed to those developments. Various methods for measuring South-South cooperation have been developed, based on the experiences of countries such as Brazil, Colombia and Mexico (see table V.A1.1 in annex V.A1). There are differences in the type of evaluation applied in each method. In one way or another, however, they all end up quantifying the monetary costs of travel (tickets), the technical workdays of public officials assigned to each case, the associated operational and administrative costs and sundry other quantitative variables, depending on the country concerned. Other countries, such as Colombia and Ecuador, have attempted to incorporate measurement variables that assess the qualitative impact, a process that is still under analysis.

At international peer-to-peer socialization forums, critical thought is given to the benefits of quantifying South-South cooperation in financial terms. Due to asymmetries in size, budget, initiatives, number of officials and other issues that exist among the countries of the South, it is believed that such quantification efforts could yield values that do reflect the real extent of the impact of shared good practices. Some of the political and technical reasons for assessing this type of cooperation proposed by SEGIB include evaluating the technical contribution offered by the country, the transparency of public spending and the possibility of generating inputs for official statistics. SEGIB has also identified a number of constraints, such as difficulties with information availability and access, as one of the main obstacles to obtaining evaluation data. This is compounded by a lack of consensus on measurement methodologies and the absence of regulatory frameworks that establish a road map for such undertakings.

Paraguay is currently discussing and working to determine how to make South-South cooperation more efficient, what advantages and innovations it offers, how efficient this cooperation is in reducing inequality and building local capacities, what impact it has and how its results can be measured. Paraguay has adhered to the general principles of South-South cooperation. These include voluntary horizontality, solidarity that breaks with the concept of assistance and promotes mutual benefits, relevance

through adapting cooperation to the reality of those involved, consensus based on the will of the parties, reciprocity, shared responsibility and equity that establishes mutually beneficial relationships between partners.

Among the main institutional actors involved with the conceptualization of South-South cooperation (the Ministry of Foreign Affairs and STP), there are officials who participate in the regional collective consensus-building processes. In those forums, they contribute and receive knowledge and share experiences. This has contributed to the formation of an incipient local critical mass. In addition to the above, the leading role played by the President of Paraguay at BAPA+40 was a turning point that could be capitalized on to define a structure to support the further consolidation of the country's dual role as a recipient and provider of this type of cooperation.

The concept of South-South cooperation and its implications are still absent from the Paraguayan academic agenda. The deepening and problematization of theoretical, philosophical and political issues (Malacalza, 2020) could be a subject for local research, the outcomes of which could provide inputs and feed into a policy to strengthen Paraguay in this area (see table V.1).

**Table V.1**  
**Latin America: policy dilemmas of South-South cooperation policies**  
**(operational framework)**

|  |  |
|--|--|
| (i) Diagnosing international scenarios and defining a strategic vision             | <ol style="list-style-type: none"> <li>1. What problems does the global community face? What kind of world should be built? How is cooperation to be governed?</li> <li>2. Global governance of South-South development cooperation: United Nations, Organisation for Economic Co-operation and Development (OECD) or both?</li> <li>3. Regional governance of South-South development cooperation: select one of the existing regional mechanisms or promote their coordination?</li> </ol> |
| (ii) Political venues for South-South development cooperation                      | <ol style="list-style-type: none"> <li>4. What narrative should be adopted for South-South development cooperation? Adaptation, reformism, reaction or counter-hegemonism?</li> <li>5. What form of development: based on economic growth or based on structural change?</li> <li>6. Access to OECD: yes or no?</li> </ol>   |
| (iii) Geographical and sectoral focus of South-South development cooperation       | <ol style="list-style-type: none"> <li>7. Alignment of cooperation: towards foreign and domestic policy priorities or towards the SDGs and the 2030 Agenda?</li> <li>8. Geographical and sectoral focus: concentrate or diversify?</li> <li>9. Cooperation scale: within the region or beyond the region?</li> </ol>   |
| (iv) Professionalization and implementation of South-South development cooperation | <ol style="list-style-type: none"> <li>10. What institutional model?</li> <li>11. Which cooperation stakeholders? Multi-stakeholder partnerships: yes or no?</li> <li>12. Reimbursable cooperation: yes or no?</li> </ol>  |

**Source:** Prepared by the author, on the basis of B. Malacalza, "Variaciones de las políticas de cooperación Sur-Sur en América Latina: estudio de casos", *Documentos de Trabajo*, No. 32, Madrid, Carolina Foundation, 2020.

## **D. Paraguay: towards an international cooperation policy**

Paraguay has begun to design a policy for international cooperation. This is an embryonic process that seeks to systematize and standardize processes, for both international donors and national institutions. One of the consensuses reached regarding this process is that the system sought should include the provision of the financial resources necessary to accompany South-South cooperation processes, thus guaranteeing the possibility of exchanges.

Recently, with support from the Government of Chile, the first exchanges for the design of this policy were carried out through the Structured Mechanism for the Exchange of South-South Cooperation Experiences (MECSS). The national government, through the Ministry of Foreign Affairs and STP, is currently devising the institutional model that will accompany the policy, so it could be useful to review other institutional models identified by the Development Assistance Committee (DAC) among its members, such as the following:

- (i) The ministry of foreign affairs assumes leadership and responsibility for policy and implementation (Denmark and Norway).
- (ii) The development cooperation department or agency within the ministry is responsible for policy and implementation (Finland, Greece, Ireland, Italy, the Netherlands, New Zealand and Switzerland).
- (iii) One ministry has responsibility for policy and an independent agency is responsible for implementation (Belgium, France, Germany, Japan, Portugal, Spain and the United States).
- (iv) A separate ministry or an agency outside the ministry of foreign affairs is responsible for policy and implementation (Australia, Canada and the United Kingdom).

In general, Latin American countries have strategies for South-South cooperation set down in various regulatory instruments (Malacalza, 2020) and which are also open to review (see table V.A1.2 in annex V.A1). Paraguay recognizes that a solid institutional structure, backed by regulatory instruments, is essential for consolidating its role as a provider of South-South cooperation. Discussions about the design of the international cooperation policy will help define the model best suited to the national reality. This is taking place at an important juncture, since in addition to the cooperation policy design process, the Paraguay 2030 National Development Plan is currently being reviewed and adapted; thus, their mutual alignment should be one of the points to be taken into consideration.

Among the most notable examples of Paraguayan cooperation, SIMORE is a success story that positions the country as a provider of quality cooperation in the multilateral arena. SIMORE, currently shared with and implemented in six countries and the IACHR, is still pending its

impact evaluation; this which will generate information for learning, both domestically within Paraguay and internationally in those places where it has been adopted.

The response expected from governments to the current emergency posed by the COVID-19 pandemic requires a cross-cutting approach to health, social protection and economic measures; at the same time, it represents an opportunity to strengthen international cooperation in general and regional South-South cooperation in particular.

The assessment of South-South cooperation must go beyond a restrictive interpretation and aim to incorporate mixed methods for quantification, evaluation, and assessment of actions, to generate quantitative and qualitative evidence for decision-making regarding national policies and international positioning.

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## Annex V.A1

**Table V.A1.1**  
**Brazil, Chile and Mexico: summary of how South-South cooperation is conceptualized**

|   | Brazil  | Chile  | Mexico   |
|---|---|--|--|
| Methodology for evaluating South-South cooperation                          | Have methodologies for evaluating international development cooperation in general, without separating South-South cooperation.   |  |  |
| Methodology in use  | Since 2010  | Since 2010   | Since 2011   |
| Elements evaluated  | Staff salaries, air tickets, per diems, supplies and materials.   | Staff salaries, air tickets, per diems, supplies and materials, technical cooperation budgets, for technical cooperation projects and for general and project support staff. | Staff salaries, air tickets, per diems, supplies and materials.  |
| Other aspects of South-South cooperation evaluated                          | Cooperation in education; scientific and technological cooperation; humanitarian cooperation; refugee protection, support and integration; peacekeeping operations; contributions to international organizations. | Only technical cooperation is assessed.  | Financial cooperation (reimbursable and non-reimbursable), contributions to international organizations (adjusted to adapted OECD criteria in the case of Mexico), academic cooperation, humanitarian aid. |
| Using evaluations for decision-making and improving South-South cooperation | Information is occasionally used for such purposes. In the 2011–2013 period, it will be used to pursue verifications of results and impact.   | Information is used to analyse the technical cooperation provided.   | Quantification information is being used to improve the running of the Mexican Agency for International Development Cooperation (AMEXCID). A pilot evaluation exercise was carried out with Honduras.      |
| Other uses of evaluation  | Analysis of South-South cooperation, linkage to foreign policy.   | Analysis of South-South cooperation, linkage to foreign policy.  | Analysis of South-South cooperation, linkage to foreign policy, linkage to improving the management of international development cooperation.  |
| Strengths offered by the country  | Conceptual analysis for the evaluation, design and adjustment of evaluation methodologies, information analysis, analysis of public policies related to cooperation.  | Conceptual analysis for the evaluation, design and adjustment of evaluation methodologies, information analysis.   | Conceptual analysis for the quantification, design and adjustment of quantification methodologies, information analysis.   |

**Source:** Prepared by the author, on the basis of Ibero-American General Secretariat (SEGIB), “Valorización de la cooperación Sur-Sur. Estudios de caso: Brasil, Chile y México”, *serie Documentos de Trabajo*, No. 10, San Salvador, 2016.

Table V.A1.2  
Latin America (selected countries): South-South cooperation strategies

| Country    | Institutional design type   | South-South cooperation strategy   | Strategy axes   | Extra-regional cooperation                                    |
|------------|---|--|---|---|
| Argentina  | General directorate or undersecretariat within the Ministry of Foreign Affairs: General Directorate of International Cooperation (DGCIN), Ministry of Foreign Affairs, International Trade and Worship. | Administrative decision No. 1146/2016. Guidelines for South-South cooperation (2013–2015) (not in force).  | “Propose the design of the development assistance policy offered by the Argentine Republic, through technical cooperation and through financial assistance when it is linked to technical cooperation” (administrative decision No. 1146/2016). | Medium (Africa and Asia; diversification strategy since 2012) |
| Brazil     | Ministry of Foreign Affairs: Brazilian Cooperation Agency (ABC), created in 1987.   | “Strategy document of the Brazilian Cooperation Agency (ABC)”, <i>Guidelines for the Development of Multilateral and Bilateral International Technical Cooperation</i> , ABC, 2016. <i>General Guidelines for the Conceptualization, Coordination and Supervision of Trilateral Technical Cooperation Initiatives</i> , ABC, 2018. | Alignment with national priorities; national, regional or local impact; knowledge dissemination potential; sustainability of results; capacity-building; others.  | High (in Africa, mainly with Portuguese-speaking countries)   |
| Chile      | Agency within the Ministry of Foreign Affairs: Chilean Agency for International Cooperation for Development (AGCID), in 1990.   | 2015–2018 International Development Cooperation Policy and Strategy of Chile.  | Pursue inclusive and sustainable development, strengthen partnerships for shared development, consolidate the national system for international development cooperation.  | Low (recently in Africa)                                      |
| Colombia   | Agency within the office of the President: Presidential Agency of International Cooperation (APC-Colombia), 2010.   | <i>2015–2018 International Cooperation Road Map</i> .  | Peace-building, sustainable rural development, environmental conservation and sustainability.   | Medium (diversification strategy since 2012)                  |
| Costa Rica | General directorate or undersecretariat within the Ministry of Foreign Affairs: Directorate of International Cooperation at the Ministry of Foreign Affairs and Worship.                                | Costa Rica 2014–2022 International Cooperation Policy.   | Citizen security, environment and territorial planning, risk management, competitiveness and innovation, social well-being.   | Low (experience with Morocco)                                 |
| Cuba       | Secretariat or directorate within the ministry of planning or other ministries: Directorate for Economic Collaboration, Ministry of Foreign Trade and Foreign Investment.                               | Principles of economic collaboration. Resolution No. 43/2005. Rules for the hiring of professionals and technicians.   | Complementarity, economic integration and international solidarity.   | High  |

Table VA1.2 (concluded)

| Country                            | Institutional design type  | South-South cooperation strategy   | Strategy axes   | Extra-regional cooperation     |
|------------------------------------|--|--|---|--------------------------------|
| Ecuador                            | Ecuadorian International Cooperation Agency, created in 2007 and replaced in 2009 by the Technical Secretariat for International Cooperation (SETECI). Undersecretariat of International Cooperation, Ministry of Foreign Affairs and Migration. | <i>Policies and Strategies for Non-Reimbursable International Cooperation 2017–2021.</i>   | Human rights, gender, environmental sustainability, interculturality and participation and capacity-building.   | Low                            |
| Mexico                             | Agency within the Ministry of Foreign Affairs: Mexican Agency for International Development Cooperation (AMEXCID) 2010.  | International Development Cooperation Act, 2011.<br>2014–2018 International Development Cooperation Programme.   | Strengthen the international cooperation for development system in order to achieve better management; expand and promote cooperation towards strategic countries and regions; establish strategic relationships with cooperation providers to attract resources and capacities; increase Mexico's presence in the world by promoting its strengths and opportunities in the areas of economy, tourism and culture. | Low                            |
| Peru                               | Agency within the Ministry of Foreign Affairs: Peruvian Agency for International Cooperation (APCI), in 2002.  | 1991 International Technical Cooperation Act. <i>Policy Statement on International Technical Cooperation</i> of the Ministry of Foreign Affairs, 2019. | Inclusive development, governance, environmental conservation and sustainability, competitiveness.  | Low (experience with Thailand) |
| Uruguay                            | Agency within the office of the President: Uruguayan International Cooperation Agency (AUCI), 2010.  | Uruguayan International Cooperation Policy for Sustainable Development to 2030 (2018).   | Position political priorities on the international cooperation and sustainable development agenda, create new opportunities for international cooperation, expand Uruguay's supply capacity and strengthen partnerships and tools for sustainable development.  | Low (since 2019 in Africa)     |
| Venezuela (Bolivarian Republic of) | General directorate or undersecretariat within the Ministry of Foreign Affairs: Vice-Ministry for Multilateral Topics. Ministry of People's Power for Foreign Affairs.   | 2016–2026 PDVSA Socialist Strategic Plan.  | Chapter entitled "Making Venezuela a social, economic and political power within the Great Rising Power of Latin America and the Caribbean, which will guarantee the creation of a zone of peace in Our America".   | Low                            |

**Source:** Prepared by the author, on the basis of B. Malacalza, "Variaciones de las políticas de cooperación Sur-Sur en América Latina: estudio de casos", *Documentos de Trabajo*, No. 32, Madrid, Carolina Foundation, 2020.



## Chapter VI

# Evaluating South-South cooperation: the case of Uruguay

*Cecilia Alemany*<sup>1</sup>

*Ricardo Herrera*<sup>2</sup>

## Introduction

As in most of the global South, the development of an institutional framework for international development cooperation in Uruguay has been progressing slowly. At its inception, the country's international development cooperation was conceived from a "recipient" approach and adopted a decentralized

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model, with a certain degree of disorganization, until the creation of the Uruguayan International Cooperation Agency (AUCI).

Initially, each ministry and subnational authority had its own international development cooperation networks, while the multilateral cooperation agenda was defined by the Ministry of Foreign Affairs (as is still the case today). For various reasons, including the low level of institutional consolidation, development cooperation in the traditional sense was pursued in a very unsystematic and sometimes erratic manner, depending on the person in charge of the Directorate General for International Cooperation within the Ministry of Foreign Affairs.

During the second half of the twentieth century and until 2010, the management of international development cooperation in Uruguay was generally disorganized, with almost no institutional structure and scant accountability. This can be explained, among other reasons, by the fact that the volumes involved were always small, in a country that was not an international cooperation priority and with low levels of corruption. That institutional landscape was not, however, unique to Uruguay. The institutional consolidation of cooperation agencies and of their management and accountability systems and methods in the developing world is a recent phenomenon that has only become widespread during the past 20 years.

## **A. Nature of South-South cooperation in Uruguay**

### **1. General features of cooperation in Uruguay**

Uruguayan cooperation has historically been that of a country committed to multilateralism and internationalism, based on the idea that a peaceful and relatively smaller country can facilitate its interactions with the rest of the world if rules are agreed on at the international level that reduce the free will of the more powerful (Alemany, 2019, p. 43 and 44). Uruguay's smaller relative size allows it to make progress with some important issues for the future, which are responsibly and innovatively adjusted to the changing times and which promote a change in the rules of the game (open government). Those issues include the progressive recognition of the rights agenda and the opportunities that the digital economy can offer a country (innovations in agriculture, software development and digital capacity-building through the Ceibal Plan, for example). In these areas and many more, Uruguay is able to share with other developing countries what it has learned in achieving those advances, and what prior studies, efforts, alliances and initiatives led to some of its development and public policy achievements (such as the care system, which, although incipient, is unique among developing countries); it can also share information regarding its ongoing reforms.

In 2006, Uruguay began to transform its institutional framework for international cooperation in order to gradually adapt it to the new challenges facing the country. The adaptation of its institutional framework began with the strengthening of the International Cooperation Department in the Planning and Budget Office (OPP) and the creation of the Uruguayan Institute for International Cooperation (IUCI). This was consolidated in 2010 with the creation of the Uruguayan International Cooperation Agency (AUCI) under the 2010–2014 National Budget Act, No. 18.719 (Lamas, 2017, p. 9). The act states that AUCI is charged with the planning, design, supervision, administration, coordination, execution, evaluation, follow-up and dissemination of international cooperation activities, projects and programmes in pursuit of the country's development policies (article 98). In terms of institutional structure, it was decided to place it—like a series of other agencies created in recent years—under the aegis of the Presidency of the Republic. Its Board of Directors comprises the Prosecretariat of the Presidency, the Directorate of the Planning and Budget Office and the Minister of Foreign Affairs. In practice, AUCI plays an increasingly important role in non-reimbursable development cooperation, as reimbursable cooperation is the responsibility of the Ministry of Economy and Finance. In turn, cooperation with international and regional financial institutions, as well as multilateral cooperation and contributions to the multilateral and regional systems, fall broadly under the purview of the Ministry of Foreign Affairs. That ministry has a General Directorate for International Cooperation, the functions of which are more political than technical, and which serves as a link between the management and technical contributions of AUCI and the broad foreign policy guidelines set by the Ministry of Foreign Affairs.

The presence of the Ministry of Foreign Affairs at the highest level on the AUCI Board ensures that coherence at the strategic level. In turn, the fact that AUCI is an entity of the office of the President allows for interconnections with national-level efforts to advance the Sustainable Development Goals (SDGs) and to structure development cooperation between subnational authorities and the central government. AUCI is less than ten years old and is not an executing agency in its own right, which means that its budget allocations go through the office of the President. It has set up an independent professional technical team that has been adapting to the changes in the cooperation system and assimilating the scope of Uruguay's dual role in the face of the challenges of the January 2018 graduation adopted by the member States of the Development Assistance Committee (DAC) of the Organisation for Economic Co-operation and Development (OECD). Its recording and reporting system has been gradually consolidated. Although its publications do not appear annually, cooperation status reports were published for 2011–2012,

2013, 2015 and 2017. Each contains the previous year's data, based on a voluntary reporting system; thus, as of the end of 2019, only data published in 2016 and before are available.<sup>3</sup> These data are consolidated by the AUCI technical team based on feedback from some 80 key stakeholders in Uruguay's international cooperation system and then incorporated into summary reports that are published online.

AUCI has been consolidating Uruguay's Integrated International Cooperation System (SICI-Uy). For its part, the Ministry of Foreign Affairs has set up the System for Monitoring Recommendations (SIMORE), an online computer tool that compiles the recommendations and observations received by the Uruguayan State from the universal human rights protection system. In the early years of the creation and consolidation of AUCI and for the implementation of SIMORE, the Uruguayan Government received support from the United Nations system in Uruguay.

In addition, since 2015, AUCI has been playing a proactive role—in close collaboration with the Chilean Agency for International Cooperation for Development (AGCID), other agencies from the region, the Economic Commission for Latin America and the Caribbean (ECLAC) and the OECD Development Centre—in the graduation process undertaken within DAC. The main criticisms put forward by Chile and Uruguay were that DAC did not even provide for a transition period or assistance, either before or after leaving the group (unlike what happens with the graduations of the relatively smaller countries, i.e. less developed countries (LDCs) within the United Nations). For this reason, work began based on the concepts of transition to development, of countries in transition and of development in transition, which were consolidated between 2016 and 2019 (Alemany, 2016 and 2019; Sanahuja and Ruiz, 2019; AGCID/UNDP, 2017).

It is true that AUCI has a long way to go in terms of institutional consolidation, functional accessibility for the analysis of data from its databases, greater transparency and accountability, as well as the modifications implied by the change of context and the challenges of a different insertion in the international system, given that Uruguay is a country in transition. Nevertheless, the interactions of AUCI with subnational governments, central government focal points and civil society actors has been strengthened in recent years. This was the case even though the planned Civil Society Advisory Council was not constituted.

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<sup>3</sup> Data on cooperation carried out over 2017–2018 were to be published in the first half of 2020.

## 2. Main areas of cooperation and Uruguay's dual role

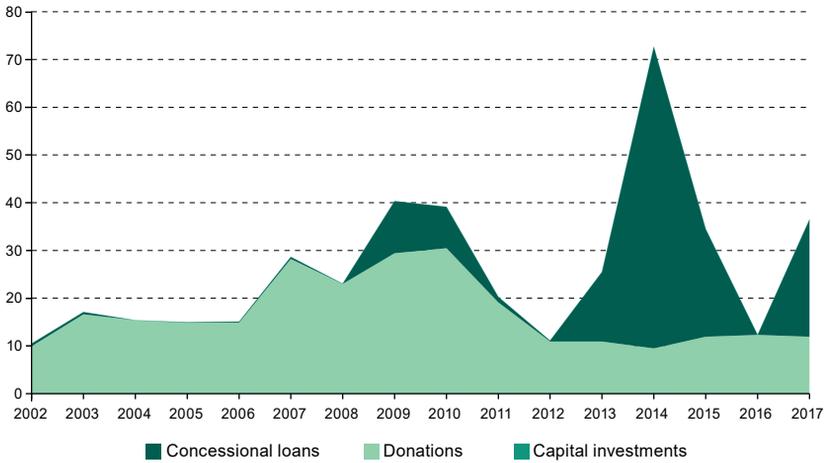
Gaps such as those described by Alonso, Glennie and Sumner (2014) and ECLAC (2016a), or development traps in middle-income countries, have been problematized in terms of traps for development in transition and are discussed in *Latin American Economic Outlook 2019*, which is dedicated to the topic of development in transition. In their analyses, both ECLAC (2016a) and Alonso, Glennie and Sumner (2014) conclude that gaps or traps can be classified into at least four major groups: (i) related to productivity and competitiveness, (ii) related to the transformation of energy and technology, (iii) related to macroeconomic stability and international financial integration, and (iv) related to social cohesion, governance and institutional quality (Alonso, 2007; Alonso, Glennie and Sumner, 2014). Uruguay, as a developing country in transition, still faces development and public policy challenges related to sustainable development in the medium and short terms and involving the resolution of socioeconomic, productive and environmental challenges. Despite the progress made in reducing extreme poverty, income inequality, gender inequality and social, territorial, and educational inequalities and discrimination, they are still present in new forms of social division, urban violence and changes in coexistence models; hence, new solutions to new problems are required (Alemany, 2019).

In general, Uruguay receives the most cooperation in areas related to social, health and environmental issues. In turn, those issues largely correspond to the main areas in its role as a cooperation provider, while the concessional loans received in the final years of official development assistance (ODA) were mainly linked to the reconversion of the energy matrix and renewable energies. The annual ODA received by Uruguay as of December 2017 ranged from US\$ 72 million (in 2014, including concessional loans) to US\$ 36 million (in 2017, the last year in which DAC counted ODA). These are gross disbursements; if commitments are counted, the volumes are around US\$ 100 million at their highest level.

Technical assistance and expert participation in ODA to Uruguay, however, have remained steady since 2011. They peaked in 2011, with disbursements totalling US\$ 11,097,855, and ended in the final year of ODA in 2017 with a total disbursement of US\$ 6,430,104 (Alemany, 2019).

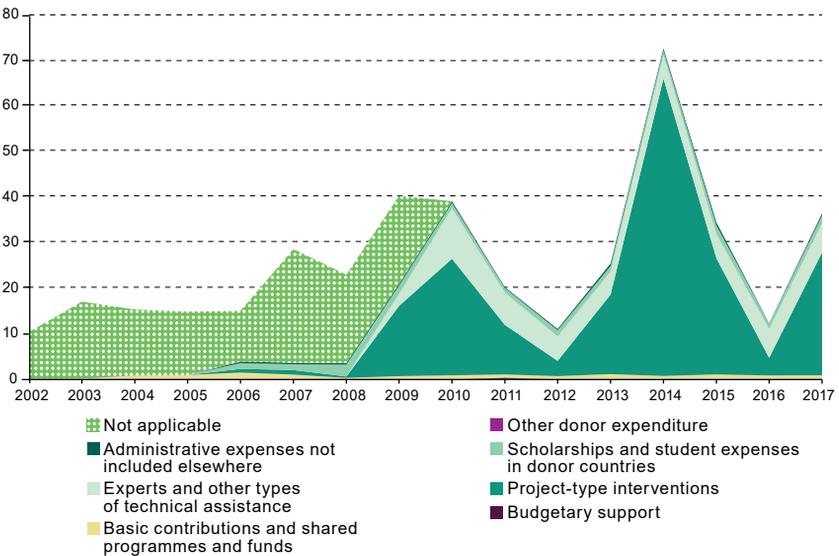
Organized civil society, as well as social movements and experts in development cooperation, working from research centres, networks and universities in Uruguay, have been a part of the cooperation fabric and the construction of the development cooperation agenda. They have also been central players in South-South cooperation at the regional level and across the global South (see figures VI.1 and VI.2).

**Figure VI.1**  
**Uruguay: total official development assistance (ODA), by type, gross disbursements, 2002–2017**  
*(Millions of constant 2017 dollars)*



**Source:** Prepared by the authors, on the basis of Organisation for Economic Co-operation and Development (OECD), Creditor Reporting System (CRS) [online database] <https://stats.oecd.org/Index.aspx?DataSetCode=crs1>; C. Alemany, “La gobernanza de la cooperación internacional está en transición y América Latina y el Caribe también”, Madrid, Ibero-American General Secretariat (SEGIB), 2019, unpublished.

**Figure VI.2**  
**Uruguay: total official development assistance (ODA), by type of contribution, gross disbursements, 2002–2017**  
*(Millions of constant 2017 dollars)*



**Source:** Prepared by the authors, on the basis of Organisation for Economic Co-operation and Development (OECD), Creditor Reporting System (CRS) [online database] <https://stats.oecd.org/Index.aspx?DataSetCode=crs1>; C. Alemany, “La gobernanza de la cooperación internacional está en transición y América Latina y el Caribe también”, Madrid, Ibero-American General Secretariat (SEGIB), 2019, unpublished.

From the government perspective, and according to how South-South cooperation is reported within the Ibero-American General Secretariat (SEGIB), this cooperation focuses exclusively on the government sphere: i.e. what is reported by governments acting in their dual roles. This diminishes the collective understanding and appreciation of South-South cooperation driven by civil society at the regional level. In the case of Uruguay, civil society has been very active. A significant percentage of the region's civil society cooperation networks are either based in Montevideo or have Uruguayan civil society representatives among their coordinators.

Understanding bilateral South-South cooperation in the official or intergovernmental sense that has been consolidated and commonly accepted by governments in the region and in the Ibero-American reports, based on the demands of the relevant partners and the capacities identified, Uruguay began offering South-South cooperation to the region's countries in approximately 2007. It should be noted, however, that its role in this type of cooperation in the region, as well as at the non-governmental level —i.e. among civil society actors (including academia)— dates back many years and can be clearly identified in its strategies adopted during the restoration of democracy. It gained even more relevance after the creation of the Southern Common Market (MERCOSUR) in 1991, which is headquartered in Uruguay.

Thus, Uruguay's intergovernmental South-South cooperation involves sharing experiences with the governments of developing countries that have expressed interest in them or that consider them of potential benefit to their national development. In order to strengthen and further its South-South cooperation activities through increased offerings, Uruguay classified its capacities into four main areas: (i) social, (ii) farming, (iii) infrastructure for development, and (iv) governance and quality of institutions (Lamas, 2017).

Most of Uruguay's South-South cooperation actions are bilateral. It is also taking its first steps, albeit with significant partners, in triangular cooperation, as well as at the subregional level within the framework of MERCOSUR, through the MERCOSUR Structural Convergence Fund (FOCEM), of which Uruguay is still a net beneficiary. Although South-South cooperation began to evolve significantly in 2005, it began in the political and institutional spheres. Subsequently, during 2007 and 2008, it began to assume a more technical nature, when reporting of activities began and more data could be obtained (Lamas, 2017, p. 11). The AUCI annual reports began to be published with data from 2011 onwards. All information prior to that date is documented solely in the South-South cooperation reports prepared by SEGIB since 2007.

In the decade since the creation of AUCI, Uruguay has diversified its links with the entire Latin American region, particularly in its role as a cooperation provider. According to the AUCI report *Estado de Situación de la*

*Cooperación Internacional en Uruguay 2017*, in 2016 Uruguay played a dual role in South-South cooperation initiatives mostly with Mexico (13 initiatives), Argentina (six initiatives) and, finally, Chile (two initiatives). In contrast, in initiatives with El Salvador, Guatemala, Nicaragua and Paraguay, its role was generally that of the provider. These figures reflect, once again, Uruguay's dual role in cooperation, even within the region (AUCI, 2017).

When analysed by sector, Uruguay maintained a dual role as provider and recipient in South-South cooperation initiatives in 2016, most notably in the areas of farming, health, industry and small and medium-sized enterprises (SMEs), and the environment. In 2016, it was a notable provider of South-South cooperation initiatives in the areas of governance, social protection, poverty and social cohesion, and health. In turn, the South-South cooperation initiatives in 2016 in which it was a recipient were mainly in the areas of culture and sport, water, health, and industry and SMEs.

The South-South cooperation offered by Uruguay does not generally involve the transfer of financial resources to the recipient country, the construction of infrastructure or the purchase of equipment. AUCI stresses that in most cases, South-South cooperation actions and projects involve an exchange of experiences that is financed through cost-sharing between the participating countries (Uruguay and the partner country), although they can also be financed through national counterparts (sectors), the Uruguayan International Cooperation Fund (FUCI), bilateral funds (such as the one established with Mexico) or with a contribution from a developed country or multilateral organization (triangular cooperation). The purpose of FUCI is to finance national projects, promote the country as a provider of cooperation and coordinate the humanitarian aid it offers, in addition to strengthening its relations with the public and private national institutions involved (Lamas, 2017). Annual amounts of between US\$ 80,540 and US\$ 180,970 were earmarked in the national budget approved in 2010. As regards the country's instruments for South-South cooperation and its levels of public investment in it, the bilateral fund between Uruguay and Mexico is particularly notable. It was established within the framework of the free trade agreement between the two countries, with each partner contributing US\$ 250,000 annually for the implementation of bilateral projects.

The strategic definitions of international cooperation for the development of countries in transition, such as Uruguay, reflect principles defined in their own cooperation policies and strategies. Uruguay's International Cooperation Policy for Sustainable Development to 2030, presented at the second High-level United Nations Conference on South-South Cooperation (BAPA+40) in Buenos Aires, consolidates the principles of Uruguay's incipient cooperation supply, which it has defended as central elements of international cooperation for development

at the regional, bilateral and multilateral levels. Uruguay's dual role, as defined by the government in the International Cooperation Policy, is based on nine principles:

- (i) **Alignment with demand:** The cooperation received and provided by Uruguay is the result of genuine demand and is aligned with the development priorities defined by the recipient country.
- (ii) **Horizontality:** The cooperation received and provided by Uruguay is based on the recognition of the other party as a partner in development, on legal equality and on respect for the partners' different contexts.
- (iii) **Equity:** The partners contribute according to their responsibilities and possibilities.
- (iv) **Non-conditional and unbound cooperation:** The cooperation that Uruguay receives and provides is not conditioned to compliance with policy models, nor is it bound to the purchase of given equipment or services.
- (v) **Interconnection:** The definition, monitoring and evaluation of cooperation policy requires intergovernmental, multilevel and inter-actor coordination, and the participation of civil society organizations as partners in international development cooperation initiatives is also needed.
- (vi) **Comprehensiveness and coherence:** The design of international cooperation actions provides for positive outcomes in all three dimensions of sustainable development, or at least ensures that actions in one dimension are not detrimental to the others.
- (vii) **Transparency and evaluation of outcomes:** Cooperation actions are transparent and respect established administrative procedures. In both cooperation policy and each of the initiatives implemented in that framework, the resources and processes used are reported and the results are evaluated.
- (viii) **Quality and focus on development outcomes:** The cooperation that Uruguay receives and provides is based on a precise description of the problems to be addressed and the development outcomes it aims to achieve, and it is sustained by the commitment of all the stakeholders involved.
- (ix) **Sustainability over time:** Cooperation initiatives strive to include mechanisms to ensure that their effects are not diluted once they are completed.

Uruguay's triangular cooperation respects the principles of South-South cooperation and maximizes their impact, mainly through funding from a partner or multilateral agency. However, this form of cooperation now takes on various forms as part of a solid strategy for further progress towards development and the achievement of the SDGs. Although triangular cooperation activities are relatively new in Uruguay, four projects and one triangular action were recorded as early as 2014. All those activities involved training (Lamas, 2017). Uruguay's main cooperation partners in the triangular cooperation initiatives active in 2016, according to the report *Estado de Situación de la Cooperación Internacional en Uruguay 2017*, were Spain, the Inter-American Development Bank (IDB) and Chile (AUCI, 2017).

In the first year of Uruguay's ineligibility for traditional cooperation (2018), the amounts of South-South cooperation offered to the country by China increased. At the same time, non-DAC cooperation from traditional donors has decreased significantly. Uruguay's dual role in this type of cooperation can be seen over the last ten years (2008–2018). During that period, out of a total of 296 initiatives identified by Uruguay in SEGIB reports (SEGIB, 2018a), in 39% the country was a recipient, in 38% it played a dual role and in 23% it was mainly a provider. From this, it can be said that the dual dynamic in which the country has recently made clear progress (with that role reaffirmed in Uruguay's International Cooperation Policy for Sustainable Development to 2030) is gaining strength as traditional cooperation is declining. However, the magnitude of that change will need to be analysed once the AUCI information system data for 2018 are available (Alemany, 2019).

Notable at the regional level are the cooperation activities that Uruguay is pursuing within the framework of MERCOSUR, including FOCEM, from which Uruguay benefits. The country also contributes to and benefits from other regional processes to which it belongs. Uruguay's financial contributions to regional South-South cooperation —i.e. those given to the various regional bodies in which it participates— are of similar volumes to those made at the multilateral level. Between 2013 and 2018, its annual contributions to regional bodies amounted to between US\$ 3 million and US\$ 4 million (in current dollars).<sup>4</sup> These data are not published as time series; instead, they must be constructed from a review of the presidential decrees that stipulate, one by one, all the country's contributions to international organizations.

It is clear that the worth of these multi-country and regional processes —as well as of the consolidation of the regional public goods in which Uruguay participates and from which it benefits through

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<sup>4</sup> Based on data from the Ministry of Foreign Affairs and the Presidency of the Republic, applying the DAC methodology adapted to the list of international organizations to which Uruguay contributes (updated in line with AGCID/UNDP, 2017).

different forms of South-South cooperation— far exceeds the amount of the direct budget allocation earmarked for financial contributions. That said, it should be noted that awareness of a country’s budgetary allocation for a development objective allows an understanding of the importance assigned to that effort and the political import it entails.

## **B. The debate on the evaluation of South-South cooperation and Uruguay’s vision**

Countries pursuing South-South cooperation began to demand recognition of their contribution to international development cooperation, and some began to construct new institutional architectures for its management. Then, developed countries began to pose questions about the characteristics of this type of cooperation, particularly as regards its effectiveness and funding amounts. As insightfully observed by Huitrón-Morales (2016, p. 111), Latin American countries understand South-South cooperation as their own independent way of contributing new cooperation mechanisms and actions. This motivates the positioning of middle-income countries as “new donors” in international cooperation. Their forms of cooperation, unlike North-South cooperation, prioritize the development agendas of each of the countries without conditions and in solidarity, which fosters genuine ownership, greater horizontality and development based on strengthening the countries’ capacities.

In view of the foregoing, and given its particular nature, the Latin American and Caribbean region understands that its South-South cooperation cannot be measured in the same way as ODA or traditional cooperation, as defined by the DAC, or as South-South cooperation from China, India or the Arab nations. These have very different characteristics and combine elements of economic cooperation with development cooperation, into which they incorporate investment objectives and tools for development and trade purposes.

The need to understand the impact of this type of cooperation in the region has always been associated with development outcomes or relevance in terms of development. Such cooperation was not financially oriented and did not obey a donor-recipient logic. For this reason, if only the value of the money invested were quantified, neither the direct and indirect impacts nor the dual dynamics of South-South cooperation in Latin America would be measured. In other words, the focus in Latin America has never been on “value for money” in the sense used by traditional cooperation partners or in the English-speaking sense of development cooperation. Instead, efforts have been made to mobilize existing resources (e.g. technicians from the civil service) to bring about

changes in partner country institutions and individuals that would lead to advances, improvements or innovations in the design of public policy or the public administration. In contrast to the money-based view, it could be said that the region's interest was always in short- and medium-term spillover effects, depending on the agencies participating or on the efforts to transfer knowledge or experiences and the exchanges between public officials or technical teams of the governments involved. South-South cooperation in Latin America and the Caribbean has been shaped by that view, based on knowledge sharing, technical assistance and the transfer of lessons learned and training or scholarships for public officials.

It could be argued that the efficiency or impact of a given effort—for the change or consolidation of another given institution or collection of individuals, policies or issues—implies some kind of investment, be it of time, of money or of human resources, all of which ultimately represent a public investment. Sooner or later, therefore, value for money will be analysed. However, this was not the approach adopted in Latin America in general, nor in Uruguay in particular. If a South-South cooperation agency wants to know whether its cooperation is efficient or relevant, with an impact on development outcomes (or on sustainable development, in the framework of the 2030 Agenda for Sustainable Development), it must have, in one way or another, a solid system for recording and appraising its cooperation that goes far beyond the financial cost (evaluation).

Why measure, evaluate and assess South-South cooperation? Can it be empirically determined whether this type of cooperation has an impact on development? Does not measuring it or not evaluating it financially imply questioning the reality of the discursive basis of this cooperation?

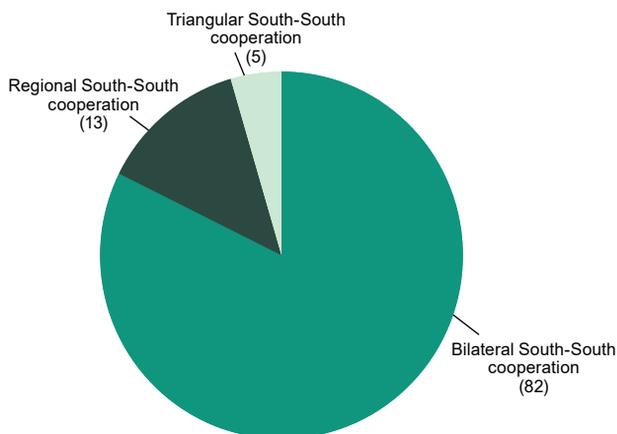
An interest in the real development benefits of South-South cooperation—beyond political and ideological links—is valid. But why the urgency to quantify, measure and evaluate that cooperation? At the start of the century, very few official agencies in the region had systems to record South-South cooperation. Indeed, as already noted, before 2000 there were only two cooperation agencies in the region.

The SEGIB reports on South-South cooperation published over the past decade have analysed the progress and evolution of that first period (2008–2018). They contain elements of interest that make it possible to examine trends, challenges, common factors and major gaps, as well as to characterize the countries in terms of their cooperation profiles. As its metric for quantifying South-South cooperation, the region adopted the number of actions, projects and programmes undertaken annually in the three recognized forms: bilateral South-South, triangular and regional South-South cooperation. South-South cooperation initiatives are totalled by adding the different instruments for each modality or by the sum of them (Rivero and Xalma, 2019, p. 13). In other

words, a description of the initiatives is produced, which enables trends to be determined, but there is no regional or Ibero-American reporting system that would allow access to microdata or basic details.

In terms of the trends revealed by the SEGIB reports over the last ten years, in the 2008–2018 period, 82% of the countries' actions or projects involved bilateral South-South cooperation, 13% entailed regional South-South cooperation and 5% were triangular cooperation. In the case of Uruguay, triangular cooperation has been in full development since 2019 and offers great potential. Regional South-South cooperation reports a lower amount because it is quantified by the number of initiatives; if, in contrast, it were quantified in terms of the countries' contributions to regional processes, the relationship with other forms of South-South cooperation would certainly be different. Perhaps from a financial perspective, regional South-South cooperation is much more important than this counting method suggests. If the contribution of South-South cooperation to regional balances or public goods and its impact on development were to be analysed, it is possible that its importance would also be different from the result indicated by counting the number of exchanges (see figure VI.3).

**Figure VI.3**  
**Ibero-American South-South cooperation 2008–2018, number**  
**of exchanges by type, SEGIB, 2018**  
*(Percentages)*



**Source:** Prepared by the authors, on the basis of Ibero-American General Secretariat (SEGIB), *Informe de la Cooperación Sur-Sur en Iberoamérica 2018*, Madrid, 2018.

According to the 2008–2018 trends analysed by SEGIB, the countries made few efforts in South-South cooperation aimed at leaving no one behind, in the sense of promoting gender equality and equality among the

most disadvantaged populations, especially indigenous or native groups. It would seem that these objectives are not development goals around which demand has emerged among countries in the region. They may not have been national policy priorities, so they were not incorporated into the region's demand for and capacity to accumulate and deliver technical assistance or South-South cooperation. The reasons for the low priority given to these objectives may be on either the supply side or the demand side, or both: demand was directed beyond SEGIB, to countries outside the region, or traditional cooperation with DAC members took place. Thus, those objectives remain more relevant within the framework of cooperation with developed countries, whether bilateral, regional or triangular.

However, the data compiled over the last decade by SEGIB are not openly accessible by the academic sector or the general public. Although they have been summarized over the course of the decade, lack of access to them prevents the expansion of the research agenda by actors outside SEGIB itself. The inaccessibility to the Ibero-American South-South cooperation databases, which are compiled by SEGIB from information supplied by its member states, goes against the logic of open data and the construction of knowledge based on empirical data. This lack of accessibility and transparency does nothing to help change the lack of an open culture of accountability in South-South cooperation.

Even if the data were public, they would not be sufficient, since the standards agreed upon for the joint Ibero-American report are focused on projects and initiatives and not on development outcomes in general. With the available data, sustainable development outcomes cannot be assessed. Although the database provides information on the number of both bilateral and triangular actions by the countries covered by the regional South-South cooperation report and the thematic areas addressed, the available reports do not shed light on their evaluation, much less provide financial information about that cooperation.

The evaluation of South-South cooperation is far from being a current concern in the vast majority of the region's countries. While some have made progress with constructing a formula for evaluating this type of cooperation, there is still no regional or global consensus on the need for such an evaluation, let alone how to go about it. The search for greater effectiveness is an obligation for all those involved in international development cooperation; consequently, it is necessary to determine the impact of South-South cooperation. To that end, in addition to registration systems, evaluation methods must be established to assess that cooperation in a different and specific way.

This process of equating impact and evaluation has led to a confusion between the need for criteria to determine the impact of South-South cooperation and the need to identify the funds that each country

contributes to that cooperation. The need to identify those amounts can only be understood in two ways: (i) to deepen academic knowledge of the South-South cooperation undertaken in the region, and (ii) to determine the funding amounts that each country provides as part of that cooperation and to ensure public accountability in the use of those resources.

In the first case, progress would be made by opening up the files and revealing the public information on South-South cooperation that the official agencies in each country are required to submit. That information could be consolidated into open-format databases to allow a statistical analysis of the data. In the second case, the possibility of arriving at a consensus formula for evaluating each country's efforts in its South-South cooperation depends entirely on political will. This makes it almost impossible, for the time being, to reach a minimal agreement across the global South.

The possibility of establishing a minimum formula of criteria in Latin America has been increasing thanks to the advances in that regard made by countries such as Mexico and Chile. What is not clear is whether this effort, were it to bear fruit, would have any bearing on the way South-South cooperation is carried out in the region. This appears to be more of a technical, academic or bureaucratic concern than a citizen demand or a need felt by those responsible for the execution and management of cooperation.<sup>5</sup>

Awareness of all the funds directly and indirectly involved in South-South cooperation in each country (e.g. resources invested in travel and per diems, and the assessment of professional hours) can only be understood if it provides some information beyond the proper use of those funds (effectiveness) for the purpose of quantifying the total contribution to development. Analyses of South-South cooperation must include quotas paid to regional organizations as part of the efforts or contributions made towards this type of cooperation at the regional level. In addition, when analysing international development cooperation in the broad sense, the contributions of the region's countries to organizations dedicated to international development and other relevant initiatives must also be included, insofar as they involve public funds and are an integral part of international development cooperation.

Reaching a consensus on the need to evaluate the South-South cooperation carried out in the region seems possible. It requires defining the applicable basic criteria and making progress in the search for greater efficiency in pursuit of sustainable development. It must also be borne in mind that this cooperation has a political dimension that is reflected in the countries' policies and strategies, so a minimum basis for consensus does

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<sup>5</sup> However, while it is not a citizen demand, the publication of data on the public funds involved in each country's South-South cooperation is a requirement for transparency and good governance, as accountability is increasingly at the forefront in the region (such as in public and public-private infrastructure investments), where there have historically been many cases of corruption.

not always exist. Since the aim is to assess and understand the impact, each country is free to broaden the selection of criteria or to decide which of the basic indicators or criteria it can or wants to implement. Because no consensus has yet been reached on how to register, quantify, evaluate and assess South-South cooperation, a number of specific models coexist, differing in terms of how cooperation is managed. In this regard, national, regional and global efforts are being made to structure processes and mechanisms to record, manage and, in some cases, quantify, evaluate and assess efforts made within this type of cooperation. Some examples are described on table VI.1.

**Table VI.1**  
**South-South cooperation evaluation and measurement systems in Latin America**

| Country  | Current status of South-South cooperation systematization, evaluation and measurement   |
|----------|---|
| Chile    | Has information records from 2010 to 2018, together with monthly financial and statistical reports. Issues reports on each public account annually and upon request.  |
| Colombia | Has a platform for recording South-South cooperation through interactive maps that indicate project numbers, the main sectors and partner countries. Also has a pilot test that has not yet received official approval, has developed internal indicators and has made an attempt at human resource evaluation.   |
| Ecuador  | Information on all cooperation is registered, with some specifics on South-South cooperation.   |
| Peru     | Has a new comprehensive monitoring and evaluation system for non-reimbursable cooperation. This newly designed system provides information on ongoing (not annual) implementation levels at the national, regional and local levels; it will also include information on South-South cooperation. Currently has a cooperation map, drawn up with support from Colombia. The system offers no evaluation of effectiveness, relevance or alignment.   |
| Uruguay  | Has the Integrated International Cooperation System (SICI-Uy), which seeks to centralize and improve the management of all areas of AUCI and strengthen the National International Cooperation System (SNCI), coordinated by the agency.<br><br>Has the System for Monitoring Recommendations (SIMORE), an online computer tool that compiles the recommendations and observations received by the Uruguayan State from the universal human rights protection system, allowing the human rights approach to be incorporated into the international cooperation system.<br><br>Is conducting a preliminary evaluation of South-South cooperation initiatives based on four principles: relevance, horizontality, quality and focus on results. |

**Source:** Prepared by the authors, on the basis of A. Huitrón-Morales, “La cooperación Sur-Sur y el reto de su cuantificación, evaluación y valoración”, *Iberoamerican Journal of Development Studies*, vol. 5, No. 1, Madrid, Complutense University of Madrid, 2016; revision by Mario Guerra from the Chilean Agency for International Cooperation for Development (AGCID), and Uruguayan International Cooperation Agency (AUCI) data.

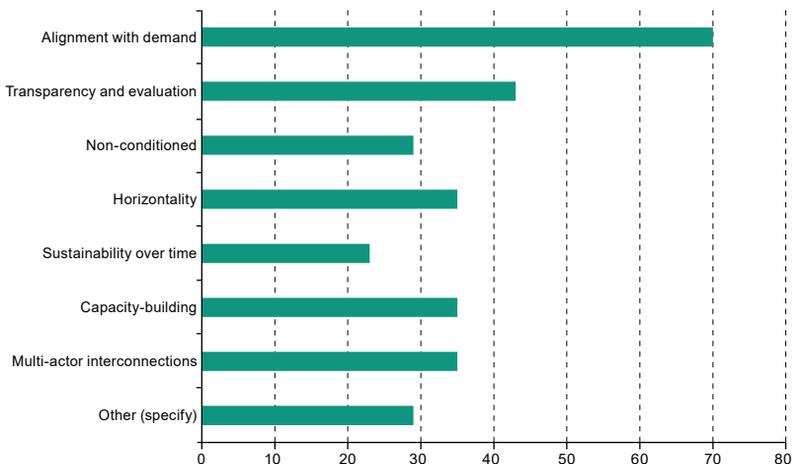
Uruguay’s approach to evaluation has been very close to that of SEGIB, which understands that the value of South-South cooperation “transcends economic considerations, since its main strength lies in the management of knowledge to enable exchanges between developing countries” (SEGIB, 2016a).

In order to gather the opinions of the experts consulted on this matter, the principles of Uruguay’s International Cooperation Policy for Sustainable Development to 2030 were presented, along with others, and

the experts were asked to indicate the three most important principles when deciding with whom to cooperate and how to do so. It is understood that a country’s decision to cooperate, be it in the framework of South-South cooperation or through any other mechanism, while demand-driven, is at the same time a strategic decision in its own right. Faced with a demand, each country decides whether or not to move forward, and whether or not to make the effort to build a link, an initiative or a joint project or programme. It is also recognized that the key components or factors in the decision to cooperate have been extensively studied for traditional cooperation and that there is a wealth of methodological and empirical knowledge on ODA allocation models. This body of knowledge can be used, *mutatis mutandis*, as a basis for any effort to understand and analyse cooperation decisions in the framework of South-South cooperation.

The results of the expert consultation are presented in figure VI.4. As can be seen, 70% of respondents indicated alignment with demand as one of the three priority principles, while more than 40% considered transparency and evaluation of development outcomes as another priority. Both principles are part of Uruguay’s International Cooperation Policy for Sustainable Development to 2030, so they would be in line with the essence of the country’s definition of cooperation adopted at the highest level. Finally, the third place in the priorities identified by the experts is taken by a set of three principles selected by 35% of the experts: horizontality, capacity-building and interconnections among multiple actors and levels.

**Figure VI.4**  
**Key principles for transition countries in deciding with whom and how to cooperate**  
*(Percentages)*



**Source:** Prepared by the authors, on the basis of expert consultations.

Uruguay is one of those countries that have a system for recording their South-South cooperation but have not made any progress towards an evaluation mechanism. Work recently began to build a system for evaluating the country's South-South cooperation, which remains a medium-term objective. The fourth strategic objective, aimed at strengthening partnerships and tools for sustainable development linked to Uruguay's International Cooperation Policy for Sustainable Development to 2030, which was launched in March 2019, stipulates that the cooperation that Uruguay receives and provides is not conditioned to compliance with policy models nor is dependent on the purchase of given equipment or services. It also states that care should be taken to ensure that the impact of sustainable development actions supported by international development cooperation is distributed equitably throughout the country's territory (AUCI, 2018). In detailing the means necessary for the policy's implementation, the resources section highlights the need to ensure—in a manner consistent with the fiscal capacity of the State and its sustainability—the availability of financial resources to strengthen Uruguay's participation in international cooperation in a dual role (AUCI, 2018), in order to:

- (i) continue to contribute to bilateral, regional and global cooperation funds;
- (ii) continue to contribute to regional funds for financing civil society;
- (iii) increase the funds allocated to AUCI to strengthen Uruguay's contributions to South-South and triangular cooperation and broaden its sustainable development impact;
- (iv) explore innovative financing instruments for South-South and triangular cooperation;
- (v) explore the creation of a scholarship fund for foreign students as part of the South-South cooperation strategy;
- (vi) explore the creation of a fund to promote exchanges of knowledge and experiences with Uruguayans abroad (the diaspora) for sustainable development; and
- (vii) explore the creation of mixed international cooperation funds with traditional or Southern partners.

All of this implies recognizing, at the policy level, that the consolidation of the dual role requires strengthening financial contributions through different methods and innovations in resource mobilization. The continuity objectives (items i and ii) notwithstanding, no progress had been made with any of the others as of the end of 2019.

One of the tools necessary for the policy's implementation (identified as such therein) is the production and management of knowledge. It states that "cooperation policy must be based on a knowledge platform to support decision-making and planning. This platform must be based on exchange and mutual learning, on the systematization of actions and outcomes, on research, on the analysis of international cooperation tools and practices and on strategies for sustainable development" (AUCI, 2018). To this end, it proposes a range of actions including: (i) promoting lines of research on international cooperation and sustainable development challenges in Uruguay, (ii) incorporating a rights-based approach and a gender perspective into the tools used for the formulation, approval, monitoring and evaluation of South-South and triangular cooperation projects, (iii) strengthening knowledge management capacities and teaching mechanisms for exchanges of experiences within the framework of the South-South and triangular cooperation programme, (iv) identifying and systematizing good cooperation practices based on Uruguay's experience, that of its partners and comparative international experiences, (v) strengthening the National International Cooperation Registry and SICI-Uy with timely information from all actors to facilitate coordination, decision-making and better use of scholarships and cooperation opportunities, (vi) disseminating and assessing, in quantitative and qualitative terms, the cooperation that Uruguay offers and receives, and (vii) promoting actions or systems to monitor and evaluate cooperation initiatives.

Many of these objectives and the means necessary for implementing the policy for 2030 are institutional and development aspirations that have not yet matured but are part of the road map drawn up for the period. One sign in that regard, albeit incipient, is that at the end of 2019, AUCI made progress with the development of a preliminary evaluation framework for the South-South cooperation provided by Uruguay. This initial exercise takes up some of the principles of the policy document (see table VI.1) and a series of criteria applicable to each principle, together with cross-cutting guidelines of efficiency, environmental sustainability, human rights, gender equality, transparency, accountability and technological efficiency. The core criteria are measured, in principle, through a series of generic indicators that seek to determine the degree of achievement compared to the set goals (the traditional logic of project evaluation) and to define degrees of progress or attainment, adequacy or correspondence (which in itself is a challenge, due to its highly subjective nature).

This exercise represents a first step towards Uruguay's own South-South cooperation matrix, which is still being developed and tested. One of the difficulties lies in the fact that it has more cross-cutting criteria than core ones, while some of the cross-cutting criteria could be placed at the core (such as transparency and accountability and effectiveness),

and that the indicators still need to mature in order to be useful for a decision-making system. In their preliminary version the indicators are more relevant for traditional project evaluations and less relevant for comparisons between projects and the incorporation of lessons learned. Within the logic of an information system for South-South cooperation decision-making, indicators that measure the degree of progress, dissemination or adequacy are not very useful because they are relative parameters, defined in relation to the environment or the interpretation given to execution in a specific institution. In turn, other indicators can be very difficult to measure and determine objectively, such as the existence of political or commercial conditioning factors.

The future implementation of this South-South cooperation evaluation matrix, following the initial testing in 2019–2020, should consider the advantages and disadvantages of this first step forward and consider moving towards a simplified system. In gathering relevant information for improvement and future decisions, it is often true that “less is more”: a few robust indicators that generate confidence and relevant information can initially be more useful than a complex battery combining four core and six cross-cutting principles. Finally, the relationship between the investment (i.e. the effort to mobilize human, material, financial and even natural resources that South-South cooperation may entail) and its outcomes is a relevant data point for evaluation purposes, beyond the percentage contribution of each party or the alignment of the forecast and actual budgets, which are also relevant objective data linked to the effort and good budget execution.

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## Conclusions

This publication describes the South-South cooperation evaluation experiences of Barbados, Colombia, Cuba, Jamaica, Paraguay and Uruguay. They offer an example of what is happening in Latin America and the Caribbean with this form of development cooperation and how its worth or merit is estimated or appraised in the region. To make a reality of its values, which have so often been set down and confirmed by the region's countries, South-South cooperation in Latin America and the Caribbean must undergo evaluation processes, studies and data analyses. It must also provide responses based on policy frameworks that define the expected impacts of its initiatives, in the medium or long term, as well as on evidence that serves to clarify the facts and consequently enables the adoption of decisions that offer a solution to development problems, in line with the 2030 Agenda for Sustainable Development.

In the midst of the coronavirus disease (COVID-19) pandemic, the 2030 Agenda still remains the region's best road map and both South-South and triangular cooperation have enormous potential for accelerating countries' progress towards the 17 Sustainable Development Goals (SDGs). Therefore, as expressed in the Buenos Aires outcome document of the second High-level United Nations Conference on South-South Cooperation (2019), it is increasingly necessary to develop methodologies to plan, monitor, measure and evaluate South-South and triangular cooperation, as well as, where possible, to establish a methodology to account for and appraise those types of cooperation.

Although Barbados, Colombia, Cuba, Jamaica, Paraguay and Uruguay form part of a recognized middle- and high-income region, the different economic and social realities that shape each of these countries' transition to development can be observed if a multidimensional view is taken. By way of example, the six countries are home to populations ranging from 287,000 people in Barbados to 51 million in Colombia (2019 figures), their per capita GDPs range from US\$ 4,916 in Jamaica to US\$ 17,762 in Barbados (2018 figures) and all exhibit differences in income, fiscal, gender, digital, social and other gaps (see table 1). Reflecting the situation in Latin America and the Caribbean, where 8 countries are classified as high-income, 20 as upper-middle-income, 4 as lower-middle-income and only 1 as low-income, of the six countries covered by the study, Barbados and Uruguay are high-income economies and the remaining four (Colombia, Cuba, Jamaica and Paraguay) are considered upper-middle-income economies.<sup>1</sup>

In view of the above, at various forums, including the Committee on South-South Cooperation, the Economic Commission for Latin America and the Caribbean (ECLAC) has drawn attention to the need to implement multidimensional metrics that go beyond per capita income, that do not leave any country out of international cooperation and that, at the same time, take due account of the reality of each country's transition to development.

The case studies show that the countries of Latin America and the Caribbean have significant experiences to provide lessons on how South-South cooperation has been evaluated and that could now allow for gradual and planned progress towards a standardized regional system based on similar or equivalent parameters. This would allow results to be unified and performances to be compared, in order to increase knowledge, improve the effectiveness and efficiency of South-South cooperation and strengthen a concerted regional voice at the global level to support the changes needed to achieve a fairer, more inclusive and sustainable international development cooperation model that leaves no one behind. Beyond States' commitments, advancing in the evaluation of South-South cooperation will allow the public to recognize and appreciate the value of contributing to other countries' development in a supportive and horizontal manner while respecting national sovereignty and without interfering in internal affairs. At the same time, it would cast light on the benefits of choosing the path of collaboration in the transition to development. Finally, the refinement of national and regional instruments for quantitative and qualitative appraisals of South-South cooperation would help disseminate the progress made with equity, transparency and accountability as agreed on in the 2030 Agenda.

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<sup>1</sup> Economic Commission for Latin America and the Caribbean (ECLAC), *Development in transition: concept and measurement proposal for renewed cooperation in Latin America and the Caribbean* (LC/TS.2021/95/REV.1), Santiago, 2021, p. 15.

**Table 1**  
**Latin America and the Caribbean (selected countries): general statistics**  
**for the South-South cooperation evaluation study**

| Variables   | Barbados | Colombia  | Cuba      | Jamaica   | Paraguay | Uruguay   |
|---|----------|-----------|-----------|-----------|----------|-----------|
| Total population in mid-2019<br>(millions of people)        | 0.3      | 50.9      | 11.3      | 3.0       | 7.1      | 3.5       |
| Poverty in 2018<br>(percentage of the population)           | No data  | 31.7      | No data   | No data   | 19.4     | 3.0       |
| Extreme poverty in 2018<br>(percentage of the population)   | No data  | 12.8      | No data   | No data   | 6.2      | 0.1       |
| Per capita GDP in 2018<br>(dollars at constant 2010 prices) | 17 761.5 | 7 722.0   | 6 769.9   | 4 915.9   | 5 455.2  | 14 535.0  |
| Income gap<br>(GDP per capita)                              | Group I  | Group III | Group III | Group IV  | Group IV | Group I   |
| Fiscal gap<br>(personal income tax as a percentage of GDP)  | Group I  | Group III | Group I   | Group I   | Group IV | Group I   |
| Gender gap<br>(percentage of women in parliament)           | Group IV | Group IV  | Group I   | Group II  | Group IV | Group III |
| Digital gap<br>(percentage of fixed broadband subscribers)  | Group I  | Group III | Group V   | Group III | Group IV | Group I   |
| Social gap<br>(Gini index)                                  | No data  | Group III | Group I   | No data   | Group II | Group I   |

**Source:** Prepared by the authors, on the basis of Economic Commission for Latin America and the Caribbean (ECLAC), *Statistical Yearbook for Latin America and the Caribbean, 2020* (LC/PUB.2021/1-P), Santiago, 2021; ECLAC, *Foreign Direct Investment in Latin America and the Caribbean, 2021* (LC/PUB.2021/8-P), Santiago, 2021; and ECLAC, *Development in transition: concept and measurement proposal for renewed cooperation in Latin America and the Caribbean* (LC/TS.2021/95/REV.1), Santiago, 2021.

**Note:** The group I countries have the smallest gaps, while those in group V are the furthest away from the reference country for the indicator in question. With the exception of the Gini index, the gaps were computed as the difference between the average value of each indicator in the 2014–2019 period for each Latin American and Caribbean country (for which information was available) and the average value in the same period of the country with the best performance in each indicator. For the Gini index, data from 2018 or from the latest year with information available were used.

The country study chapters in this book demonstrate that the evaluation of South-South cooperation is tied in with political, institutional and methodological decisions. The qualitative and quantitative (monetary and non-monetary) evaluation options are related to countries' foreign policy choices. This, in turn, translates into a series of regulatory and institutional challenges, such as organizational structure, institutional framework, degrees of intersectoral collaboration, public-private linkages, strategic agendas, programmes and projects.

From a historical and institutional perspective, Latin America and the Caribbean is a region with different political, economic and social realities, which have influenced the countries' different international political relations, including the establishment of cooperation agreements and, specifically, South-South cooperation initiatives.

The case studies of Barbados and Jamaica, carried out by Byron and Laguardia Martínez, describe the reality of the Caribbean, a subregion with countries whose history of independence is more recent than that of the Latin American nations. These are developing States, defined as small and vulnerable, whose international relations have been based on subregional integration: first with the creation of the Caribbean Community (CARICOM), the main subregional grouping, and later with the establishment of the Organisation of Eastern Caribbean States (OECS) and the Association of Caribbean States (ACS). Immediately after independence, these countries became members of the United Nations and the Commonwealth, in addition to being part of the African, Caribbean and Pacific (ACP)<sup>2</sup> developing countries' community of interests and signatories to the Lomé IV Convention and the Partnership Agreement between the members of the African, Caribbean and Pacific Group of States of the one part, and the European Community and its Member States of the other part (Cotonou Agreement). Through their incorporation into the international arena, they have forged special ties with the member countries of the Organisation for Economic Co-operation and Development (OECD) and with multilateral development institutions.

In both Barbados and Jamaica, South-South cooperation is run by the Ministry of Foreign Affairs, in conjunction with other ministries or public agencies (see table 2). In Barbados, responsibility lies with the Ministry of Foreign Affairs and Foreign Trade, along with the Ministry of Finance, Economic Affairs and Investment, where the Research and Planning Unit and the Statistical Services Department play key roles in managing development and gathering data on external development cooperation. In Jamaica, cooperation issues are handled by the Ministry of Foreign Affairs and Foreign Trade, primarily its divisions responsible for multilateral affairs, for bilateral, regional and hemispheric affairs and for foreign trade. The Planning Institute of Jamaica (PIOJ), through the External Cooperation Management Division (ECMD), also plays an important role in managing the cooperation agreements and programmes entered into by the Ministry of Foreign Affairs and Foreign Trade.

In Cuba, the State has historically been in charge of running international cooperation. As explained by Guerra Rondón, in the 1970s this cooperation was institutionalized through the State Committee for Economic Co-operation (CECE), in the 1990s the Ministry of Foreign Investment and Economic Cooperation (MINVEC) was created and, in 2009, the Ministry of Foreign Trade and Foreign Investment (MINCEX) was established.

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<sup>2</sup> ACP has evolved into the Organisation of African, Caribbean and Pacific States (OACPS).

Among the South American countries, Paraguay has a Directorate for International Cooperation, which is part of the Ministry of Foreign Affairs, and it is in the process of creating a political agency for international cooperation with the support of the Ibero-American Programme to Strengthen South-South Cooperation (PIFCSS). Both Colombia and Uruguay have cooperation agencies. Since 2011, the Colombian Presidential Agency of International Cooperation (APC-Colombia) and the International Cooperation Directorate of the Ministry of Foreign Affairs have been in charge of cooperation in Colombia. The Uruguayan International Cooperation Agency (AUCI) has been operating uninterruptedly for ten years, working in coordination with the General Directorate for International Cooperation of the Ministry of Foreign Affairs.

**Table 2**  
**Latin America and the Caribbean (selected countries):**  
**institutional framework for cooperation, 2021**

| Countries     | Institution                       |  |  |
|---------------|-----------------------------------|--|--|
|               | Cooperation agencies              | Within the Ministry of Foreign Affairs | Within another ministry or government department |
| Latin America | Colombia and Uruguay <sup>a</sup> | Paraguay                               | Cuba   |
| The Caribbean | Barbados and Jamaica              |  |  |

**Source:** Prepared by the authors, on the basis of official information from the countries.

<sup>a</sup> In both Colombia and Uruguay, in addition to the cooperation agency, there is a department (vice-ministry or directorate) for international cooperation within the Ministry of Foreign Affairs.

The studies also reveal that the countries' South-South cooperation agendas, programmes and projects are shaped by their relations with international development cooperation structures, particularly as regards South-South cooperation. As noted by Byron and Laguardia Martínez, Barbados, classified as a high-income economy, saw its access to concessional development finance constrained for more than a decade. The authors note that in response to this constraint, Barbados has been active with a critical voice in international forums, advocating for more inclusive development support mechanisms and a global environment more conducive to considering the vulnerabilities faced by developing countries in the Caribbean, which are typically middle-income economies with high levels of debt and climate vulnerabilities. In addition, Barbados participates in multilateral forums, accesses credit financing from regional development banks and maintains strong bilateral relations through South-South cooperation.<sup>3</sup>

<sup>3</sup> Barbados is an active participant in the multilateral world through different United Nations organizations and platforms, and through groupings such as the Organization of African, Caribbean and Pacific States (OACPS), the Commonwealth, the Alliance of Small Island States (AOSIS) and the Group of 77 and China.

Barbados has been a notable beneficiary of and contributor to knowledge sharing and training cooperative projects. Byron and Laguardia Martínez highlight the fact that since the 1970s, the country has had significant South-South cooperation experiences with the Bolivarian Republic of Venezuela, Brazil, Cuba and Mexico. So far, the programmes have included capacity-building in health, education and sport, experiences in agriculture and food security, and initiatives in the areas of energy and cultural cooperation. More recently, Barbados has been involved in cooperation initiatives with various Latin American and Caribbean countries, such as the Bolivarian Republic of Venezuela, Brazil and Cuba, as well as with China, other Pacific small island developing States and Commonwealth partners, such as Ghana and Kenya. The emphasis of those cooperation efforts was on environmental protection and climate change adaptation and mitigation strategies, as well as capacity-building for disaster risk management and the development of a green economy. Also noteworthy is the fact that Barbados has been able to access credit financing from two regional development banks: the Caribbean Development Bank (CDB) and the Development Bank of Latin America (CAF).

Byron and Laguardia Martínez note that since Jamaica is considered a middle-income economy, it has, like Barbados, experienced constraints on its access to development financing. However, the authors stress that Jamaica has a long history of strong South-South cooperation partnerships with Latin America and the Caribbean, which have expanded since the 1990s. Among the most effective governance mechanisms for these processes are the bilateral joint commissions Jamaica has set up with many of its partner countries. Multilateral agencies and partner countries working through triangular cooperation agreements have supported Jamaica in building the capacity it needs to make further progress with the implementation of the 2030 Agenda for Sustainable Development. Local leadership in public sector agencies, as well as from civil society actors, has been fundamental in implementing South-South cooperation programmes in the country. Jamaica has also forged an extensive network of Southern partners in Africa, Asia and the Pacific, and Latin America and the Caribbean (including Cuba and CARICOM member states). Since 2010, China and the Bolivarian Republic of Venezuela have been Jamaica's two most important partners. As noted by Byron and Laguardia Martínez, the impact of South-South cooperation in the country has been most visible in the health, education, energy and social protection sectors; it has also been present in other areas of social policy. Jamaica is also emerging as a contributor to South-South cooperation in certain areas of expertise, including election monitoring, sports, tourism and social protection programmes.

Colombia is one of the most widely renowned Latin American countries for its international cooperation work. As Guerra Rondón explains, Colombia offers cooperation—bilateral and regional cooperation, international assistance and special programmes—under the umbrella of a high-profile foreign policy. Since 2010, Colombia has expanded its scope for international impact and outreach in financial cooperation by consolidating joint regional agendas, called “regional cooperation strategies”, which it now has in place in the Caribbean Basin, Mesoamerica, Africa, South-East Asia and Eurasia. Despite the large number of countries receiving bilateral and triangular technical cooperation projects, Colombian cooperation focuses on the countries of Central America and the Caribbean Basin, where there are serious problems of violence and crime related to drug trafficking. As an example, Guerra Rondón reports that the main recipients of security cooperation initiatives include Ecuador, Guatemala, Honduras and Mexico. Colombia has also signed framework South-South cooperation agreements with many countries, including Argentina, Barbados, Brazil, Chile, China, Costa Rica, Cuba, the Dominican Republic, Ecuador, Egypt, El Salvador, Guatemala, Guyana, Honduras, India, Indonesia, Jamaica, Malaysia, Mexico, Morocco, Panama, Paraguay, Peru, the Plurinational State of Bolivia and Uruguay.

Cuba has one of the region’s longest track records in South-South cooperation and, like other middle-income countries, it plays the dual role of provider and recipient of official development assistance (ODA). The country is in particular demand for its knowledge and expertise in the areas of health, education and disaster prevention. As Guerra Rondón explains, in the framework of its South-South relations, Cuba channels its projects through various regional organizations and multilateral institutions, including CARICOM, the Bolivarian Alliance for the Peoples of Our America - Peoples’ Trade Agreement (ALBA-TCP), the World Health Organization (WHO) and the Pan American Health Organization (PAHO). One notable example of its South-South cooperation is *Misión Milagro*, which was created within the framework of the Comprehensive Cooperation Agreement between the Republic of Cuba and the Bolivarian Republic of Venezuela, following the detection of a high percentage of eye ailments among the Venezuelan population. In the education sector, the *Yo Sí Puedo* programme has been one of the leading efforts. Cuban cooperation has also shown great leadership in emergency aid and disaster prevention. Notable in this regard was the creation in 2005 of the Henry Reeve Medical Brigade, tasked with providing aid to the population affected by Hurricane Katrina in New Orleans, United States.<sup>4</sup> The brigade

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<sup>4</sup> Cuba has been offering humanitarian medical services since the early 1960s. The Henry Reeve Brigade was built on decades of cooperative experience. During the COVID-19 pandemic, the Brigade has again raised the visibility of Cuba in its ongoing international cooperation in the area of health services.

has remained active to the day and has become a highly trained group that provides emergency services and primary care in disaster situations. These programmes have been positively reinforced in recent years through the recognition extended by multilateral institutions, lending legitimacy to Cuba's good practices.

Vaccotti Ramos details Paraguay's historical participation in bilateral cooperation and in various different blocs, but also clearly indicates that the country's actions in South-South cooperation are more recent. In her chapter the author highlights Paraguay's historical links with international cooperation through examples such as its participation in the Pan American Union (the forerunner of the Organization of American States (OAS)) and the fact that it was one of the first countries to receive cooperation from the World Bank (or the International Bank for Reconstruction and Development (IBRD), as it was at the time) and a beneficiary of the Alliance for Progress. In the field of binational relations and integration, Vaccotti Ramos identifies, as a milestone in dialogue and cooperation, the construction of the Itaipú dam with Brazil (1973) and the Yacretá dam with Argentina (1973), the formation in 1963 of the Urupabol Commission—an international organization that brought together Uruguay, Paraguay and the Plurinational State of Bolivia and that, in 2014, was reborn through the project to transport liquefied natural gas along the Paraguay-Paraná waterway—and the country's participation in the creation of the Southern Common Market (MERCOSUR) in 1991. As Vaccotti Ramos explains, Paraguayan international cooperation has only developed significantly in recent times, on account of a number of factors including the participation of its authorities and technical professionals in regional and extraregional forums. Its incipient progress means that the country is in the process of consolidating its dual role within South-South cooperation. Recently, in 2016, Paraguay established inter-agency coordination mechanisms between the Ministry of Foreign Affairs, the Ministry of Finance and the Technical Planning Secretariat for Economic and Social Development for managing its cooperation. It also defined the channels for cooperation requests, as well as for identifying opportunities and for the design of cooperation proposals by the different State agencies. However, as the author points out, the country has still to strengthen the State's conviction regarding recognizing its own transferable capacities and the importance of maintaining a cooperation supply. Although the development of South-South cooperation in Paraguay is still embryonic, Vaccotti Ramos highlights two good practices that could be shared with others: (i) the Recommendations Monitoring System (SIMORE), which has positioned the country as a provider of quality cooperation in the multilateral arena and is currently shared with six countries and the Inter-American Commission on Human Rights

(IACHR), and (ii) Paraguay's first experience of public-private partnership for South-South cooperation, which specifically addressed Goal 17 of the 2030 Agenda ("strengthen the means of implementation and revitalize the global partnership for sustainable development"). This second good practice involves Fundación Paraguaya, which has a track record of over 25 years as an active provider of cooperation in more than 20 countries, and the Paraguayan Ministry of Foreign Affairs; programmes such as the Poverty Elimination Stoplight, self-sustainable schools, entrepreneurial education and microfinance with a social focus are included in their catalogue of cooperation offers.

Alemany and Herrera note that Uruguay has historically been committed to cooperation, multilateralism and internationalism, and they highlight its peaceful nature and smaller relative size, two characteristics that have consistently facilitated its interactions with the rest of the world. In general terms, the authors relate that from the second half of the twentieth century until the first decade of the twenty-first, international development cooperation in Uruguay was extensive but without a refined methodology, with an almost non-existent institutional framework and scant accountability. This is explained by the fact that Uruguay was not a priority country for international cooperation, with low project volumes and little corruption. In that context, most of its South-South cooperation actions were bilateral in nature, with nascent triangular activity involving regional and extraregional partners, together with subregional activity.<sup>5</sup> In Uruguay, as Alemany and Herrera indicate, South-South cooperation began to come to the forefront in 2005, initially in connection with political and institutional matters and, later, in technical areas. After 2010, following the creation of AUCI, Uruguay forged ties with all of Latin America, in a dual role and as a provider of cooperation in such areas as agriculture, health, industry and small and medium-sized enterprises (SMEs), environment, governance, social protection, poverty and social cohesion. The South-South cooperation offered by Uruguay does not generally involve the transfer of financial resources to the recipient country, the construction of infrastructure or the purchase of equipment. AUCI stresses that in most cases, South-South cooperation actions and projects entail an exchange of experiences that is financed through cost-sharing between the participating countries (Uruguay and the partner country), although they can also be financed through national counterparts (sectors), the Uruguayan International Cooperation Fund (FUCI), bilateral funds (such as the one established between Mexico and Uruguay) or with a contribution from a developed country or multilateral organization (triangular cooperation).<sup>6</sup>

<sup>5</sup> As an example, the authors highlight MERCOSUR and, specifically, the MERCOSUR Structural Convergence Fund (FOCEM).

<sup>6</sup> The purpose of FUCI is to finance national projects, promote the country as a provider of cooperation and coordinate the humanitarian aid it offers, in addition to strengthening its relations with the national public and private institutions involved.

This brief overview of the institutional framework in Barbados, Colombia, Cuba, Jamaica, Paraguay and Uruguay, the regulatory and institutional challenges these countries have had to address, their strategic agendas and their main programmes and projects provides an understanding of how these countries have approached the evaluation of South-South cooperation.

Studies have revealed some critical positions in Latin America and the Caribbean with respect to adhering to a traditional system for evaluating South-South cooperation based solely—or primarily—on the monetary quantification of the economic resources involved. This is in line with the traditional approach to monitoring and evaluating ODA policies of the OECD Development Assistance Committee (DAC).

Beyond institutional and policy differences in cooperation, the six cases presented also illustrate the complexity of establishing national South-South cooperation evaluation methodologies for their subsequent adoption at the regional level. Those difficulties, moreover, underline the importance of starting by improving national systems for identifying good practices that describe their contents in a way that they can be replicated and, at the same time, shared in regional venues that facilitate cooperation between two or more interested countries. Knowledge of countries' good practices, ideally subject to evaluations of their direct and indirect results or impacts, is a prior or complementary step to quantitative monetary and non-monetary measurements of what cooperation contributes, an input for national decision-making on how and with whom to cooperate and a good starting point for building regional and interregional cooperation bridges among actors in the global South.

In the Caribbean, South-South cooperation has expanded, generating more and better possibilities for development financing. This created greater incentives to explore the new opportunities offered by South-South and triangular cooperation, including new forms of engagement with regional development banks and multilateral organizations. Barbados and Jamaica, however, still face some challenges in South-South cooperation, such as capacity-building to systematize and evaluate technical cooperation activities, including the design of appropriate methodologies to gather quantitative and qualitative information on cooperation initiatives, to manage possible information gaps that the process may produce and to generate worthwhile data for knowledge-building and decision-making.

As noted by Byron and Laguardia Martínez, in both Barbados and Jamaica, institutional capacities need to be strengthened to document and, going forward, preserve all development cooperation, disaggregating information beyond generic terms such as “bilateral”, “multilateral” and “technical”, and making it possible to analyse and interpret the data,

evaluate results and development impact, and use the findings to make policy decisions. There is a perception in both countries that the monetary value of South-South cooperation is relatively small, but this is tempered by the recognition that accurate measurement tools that would highlight the non-monetary value of this form of cooperation, which goes far beyond its financial appraisal, have not yet been developed.

The evaluation situation across Latin America and the Caribbean is not entirely different from that in Barbados and Jamaica, but there are certain nuances. Since its involvement with South-South cooperation is only recent, Paraguay does not have its own evaluation process. Based on interviews with authorities and professionals in the area, however, Vaccotti Ramos notes that the evaluation of Paraguay's South-South transcends the restrictive monetary interpretation to incorporate mixed qualitative and quantitative methods for appraising and evaluating cooperation. With this, Paraguay hopes that the evaluation process will help in adopting national policy decisions and in raising their international, regional and interregional profile.

Uruguay, in contrast, has documented information on this type of cooperation since the mid-2000s, and its cooperation agency (AUCI) has published annual reports since 2011. Alemany and Herrera note that Uruguay, along with much of the region, has been critical of the possibility of endorsing a traditional system for evaluating cooperation based on the monetary quantification of the resources involved. Instead, the country has argued that the crucial element is not the quantitative volume of cooperation, but rather the value it adds to a rights-based, inclusive, innovative agenda that, among other things, has sustainable development at its core. In Uruguay's view, efforts to systematize South-South cooperation should be built on processes led from Latin America and the Caribbean and not on the basis of imported methods—from the OECD Development Assistance Committee, for instance—nor should its main concern be monetary quantification. According to Alemany and Herrera, however, Uruguay is aware of the need to measure or evaluate cooperation in the interests of efficiency and more transparent decision-making, through such factors as objective data, analyses and lessons learned. Based on interviews with Uruguayan authorities, the authors argue that the lack of empirical evidence and hard data regarding the amounts mobilized and the lack of political will among the countries of the global South regarding increasing the transparency of budgets linked to South-South cooperation are obstacles for the region in discussing—either at the regional level or with partners from beyond—alternatives for development cooperation.

In Cuba, the South-South cooperation systematization model is particularly qualitative and, as in other countries of the region, places

results above economic disbursements and is organized according to the programmes to which the country contributes as a donor in the modalities of technical, scientific and financial cooperation. Nevertheless, as Guerra Rondón points out, given Cuba's relative importance in the field of international cooperation, it would be interesting to learn about its experience with managing indicators, in order to facilitate the national consolidation of methodologies for evaluating South-South cooperation and move towards shared methods in the region.

Colombia sees South-South cooperation as a national priority and a leading foreign policy instrument. It has therefore maintained a system for recording its actions and projects, aligning them with national and global agendas. The country has also innovated in terms of how it conceptualizes and appraises South-South cooperation, and it has worked on the results according to quantitative and value-added models, respecting the founding principles of that form of cooperation. This does not mean that Colombia has uncritically assumed the OECD evaluation methods. There is a long history of systematizing South-South cooperation in the country. Guerra Rondón reports that in the first stage, only ODA cooperation amounts were considered, while in later stages, data on South-South cooperation were included. In this process, the progress achieved in 2017 stands out, the year in which APC-Colombia published the *Colombia SSC Toolbox Manual*, which sets out the steps required to fill out the South-South cooperation project formulation form. This form uses a two-component approach, called the Quantification and Value Addition Model (MCAV). The first component involves the quantification of direct and indirect costs associated with activity implementation, while the second examines the value added by project contributions. The Colombian model for evaluating South-South and triangular cooperation, as noted by Guerra Rondón, has great potential for export to other developing countries, as it combines quantitative and qualitative elements—the latter in the form of added value—and thus to a certain extent transcends the South's discourse regarding the non-quantifiable contributions of South-South cooperation. In recent years, the *Colombia SSC Toolbox Manual* has been accompanied by a manual for the formulation of international cooperation projects that incorporates the MCAV methodology and the ECLAC logical framework methodology.<sup>7</sup> The component for assessing South-South and triangular cooperation recognizes that the potential of South-South cooperation lies in the strength of the partnerships it forges and its ability to promote knowledge sharing and showcase achievements.

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<sup>7</sup> See Presidential Agency of International Cooperation (APC-Colombia), *Herramientas para la formulación de proyectos de cooperación internacional*, Bogotá, 2020 [online] <https://www.apccolombia.gov.co/sites/default/files/2020-10/herramientasformulacio%CC%81nproyectos.pdf>.

The six cases presented illustrate the latest advances in evaluating South-South cooperation in the region and provide a basis from which to move forward. They should also be complemented by contributions from other Latin American and Caribbean countries with recognized expertise in this area, such as Brazil and Mexico.

For years, Latin America and the Caribbean have been facing ongoing reductions in funding from traditional development cooperation. What is happening is that, in a rapidly changing world, most of the region's countries are considered middle-income economies and ODA is going to other parts of the world. Globally relevant actors from the South have emerged and global risks and challenges have evolved, especially socioeconomic inequalities and environmental threats, reflecting the economic, social and political changes associated with globalization and climate change.

South-South and triangular cooperation must be linked to national development strategies in line with the 2030 Agenda for Sustainable Development. That belief is shared by all six countries examined herein. The 2030 Agenda demands changes in the governance of development cooperation, including South-South and triangular cooperation. Achieving the SDGs requires development to be achieved through international cooperation at various levels, convening multiple actors and addressing its different dimensions, not income alone. As one example, the Caribbean must pay special attention to the threats that climate change poses to its economies, ecosystems and human settlements; this will require technical cooperation and capacity-building in green technologies, mitigation and adaptation strategies and disaster risk management.

The COVID-19 pandemic has had devastating health, social and economic effects in the region. Latin America and the Caribbean today is very different from when the 2030 Agenda for Sustainable Development was adopted, when the decade of action for the Sustainable Development Goals was proclaimed and when the Buenos Aires outcome document of the second High-level United Nations Conference on South-South Cooperation was published. ECLAC has called on the region to face its adversities through strengthened international cooperation and the pursuit of regional integration towards a transformative recovery. For ECLAC, the post-COVID-19 world demands more multilateralism, more international cooperation and more regional integration. The middle-income countries' integration forums have institutions and technical instruments that can be mobilized to promote coordinated actions and responses to global problems through South-South cooperation, offering possibilities that go far beyond traditional notions of technical cooperation. South-South cooperation agreements should be used to explore new approaches

to development financing, including debt swaps and public-private partnerships. At the same time, many actors from the South —both in Latin America and the Caribbean and elsewhere in the world— are emerging as new partners, prominent in scientific and technological innovations as well as in the areas of digital technologies. The experience of the COVID-19 pandemic has already stimulated new South-South cooperation efforts in public health.

This study aims to contribute to reflection about the regional standardization of South-South cooperation evaluation and to support the exchange of knowledge, experiences and best practices on South-South and triangular cooperation in pursuit of sustainable development. Adjusting the formats in which countries present the results of their South-South cooperation will make it possible to collate this information for sharing and to support intraregional and interregional comparative analyses, generating useful knowledge for country decision-makers, non-governmental organizations, researchers and international agencies, other significant cooperation actors and the general public and thereby underscoring the fact that the road to development requires mutual collaboration.



In an increasingly uncertain world, the 2030 Agenda for Sustainable Development is a point of reference and a road map, and South-South and triangular cooperation have become ever more important for mobilizing additional resources for implementation of the Agenda, for increasing cooperation capacities and for providing flexible solutions to development challenges.

The outcome of the second High-level United Nations Conference on South-South Cooperation invited interested developing countries to engage in consultations within the framework of the regional commissions, relevant intergovernmental forums on South-South and triangular cooperation or regional organizations, on non-binding voluntary methodologies for measuring and evaluating cooperation, building on existing experiences, taking into account the specificities and different modalities of South-South cooperation and respecting the diversity within South-South cooperation and within national approaches.

This publication offers keys to understanding the value of South-South and triangular cooperation in the region, while providing data on the experiences of Latin American and Caribbean countries, as necessary inputs for advancing in the process of sharing and standardizing methodologies for measuring cooperation at the regional level.

