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What is the Empirical Foundation for Theorizing the Brazilian South-South Cooperation? A Scoping Review

DOI: <http://dx.doi.org/10.1590/0034-7329202600110>

Rev. Bras. Polít. Int., 69(1): e011, 2026

Abstract

Brazilian South-South Cooperation (BSSC) has been the subject of intensive research, but no systematic review has been carried out so far. Current literature fails to answer key questions: How has the research agenda on BSSC evolved? Which methods were used? What evidence supports the analytical frameworks? Are studies or cases comparable? Based on Arksey and O'Maley, this paper maps the conceptual structure of scholarly debate, identifies research gaps, and clarifies research methods and empirical foundation. Conclusions point to a sustained decline in scientific output, unreliable empirical foundation, problematic theorizing, and limited collaboration, reinforcing the need for a common research agenda.

Keywords: South-South Cooperation, International Cooperation, Scoping Review, International Development, Brazilian International Relations, Policy Transfer.

Received: March 05, 2026

Accepted: July 27, 2026

Introduction

Two competing and institutionalized forms of international cooperation for development models addressed the issue of distributional justice and equity since the end of the 2nd World War (Ocampo 2016). On the one hand, Official Development Assistance (ODA) has crystallized as institutional support from developed countries to underdeveloped regions worldwide. On the other, South-South Cooperation (SSC) emerged as a political-emancipatory movement, whose roots lay in the 1950s decolonization process (Bergamaschi, Moore and Tickner 2017).

SSC is frequently depicted in two different waves (Mawdsley 2019; 2012). The first, from the 1950s to the 1980s, was marked by decolonization and the emergence of an institutionalized

contestation of the international economic and political order, fomenting a non-aligned movement within a bipolar international structure. After the economic crises of the 1980s and 1990s, SSC reemerged in the 2000s amid the commodity boom and the 2008 economic crisis that seriously damaged almost all developed countries' economies (Zakaria 2009). With increased status and resources, the then-called “emerging powers” consolidated new multilateral and regional clubs of southern countries (Barros-Platiau and Orsini 2020) and intensified one of the main SSC agendas since its inception: socio-economic development with distributional justice, thus leading to the current debate on the definition of the Global South and its implications for research (Dhanasree et al. 2025).

Brazil was a resounding actor amid the “emerging power” 2nd wave phenomenon. Official data from the Institute of Applied Economic Research (*IPEA*) and the Brazilian Cooperation Agency (*ABC/MRE*) report increases in Brazilian expenditures with South-South Development Cooperation, and in the overall number of projects, with particular interest in Latin America and Africa (Schleicher 2024; 2022; Instituto de Pesquisa Econômica Aplicada 2010; 2013; 2017; 2020; 2022). Despite the existing knowledge on Brazilian SSC, no systematic reviews have been conducted to date. Key questions remain unanswered: What are the main features of the research agenda on Brazilian SSC? Which methods were used? What evidence supported the studies? Are studies or cases comparable? What has been learned so far?

This article proposes a scoping review of Brazilian SSC. Amongst many reasons, scoping reviews can shed light on the conceptual structure of scholarly debate, identify research gaps, and unveil research methods and empirical foundations. They also tend to be a first step for producing systematic reviews, which are more focused on synthesizing the knowledge produced in a field. Consequently, the article is structured around Arksey and O'Maley's (2005) scoping review protocol and its improvements (Levac et al. 2010; Armstrong et al. 2011; Daudt et al. 2013). After the materials and methods section, the paper introduces the identification of studies, the study selection, and the data charting sections, as well as sections related to summarizing and reporting the results. The closing section discusses the implications for the main research question: What is the empirical foundation for theorizing the Brazilian South-South Cooperation (BSSC)?

Materials and Research Methods

Scoping reviews are regarded as invaluable tools when a field of knowledge is still blossoming. They are particularly useful for identifying and mapping available knowledge related to a research question, without necessarily leading to a synthesis effort (Munn et al. 2018). The utility of a scoping review to address the proposed research question aligns to the reasons laid out by Arksey and O'Maley (2005). The authors remark that examining “(...) the extent, range and nature of research activity” and identifying “(...) research gaps in the existing literature” are paramount to map a field of studies and foster the development of a stronger evidence base when research is

still underdeveloped on specific topics (Arksey and O'Maley 2005). In addition to the rationale for scoping reviews, the authors also propose a six-stage protocol (Supplement I).

Even though Arksey and O'Maley's (2005) six-stage scoping review protocol has become a reference in the field, improvements have been proposed. Concerning the research question, Levac et al. (2010) suggest that concepts, context, and desired outcomes be as specific as possible. In addition, the selection of studies must be seen as an iterative, and not a linear process. Participation of more than one researcher would be essential, to ensure the necessary debate, iteration, and proper study selection.

Armstrong et al. (2011) add that identification of existing limitations should be considered in the process of identifying studies, given the objective of a scoping review. Recording the decision and criteria for identifying the studies is more important than effectively including documentation from all possible sources. In addition to transparency in reporting possible limitations in covering all available sources, the criteria for charting data should be closely connected to the research question and progressively support the consolidation of common categories. By using similar categories such as intervention type, study objectives/goals, methods, outcomes, etc., different review authors can collaborate to progressively map and address research gaps within a given field of inquiry (Armstrong et al. 2011).

Daudt et al. (2013) endorse the participation of several researchers in the scoping process. They also suggest that the cost of engaging a large and multidisciplinary group may be diluted by the benefits brought by increasing the quality of the iterative process. The involvement of a large group of researchers may improve the charting process, as it can enhance efficiency and reduce the degree of subjectivity in extracting information from studies. As for summarizing the results, the authors also emphasize the importance of maintaining focus on the research question, which is indispensable for guiding selection and interpretation of the data collected from documentation (Daudt et al. 2013).

A scoping review was chosen as the preferred method for addressing the research question. Since there is no best model for synthesizing knowledge among scoping review protocols, the paper focuses on mapping the field and categorizing the main methodological aspects in each selected study. Even though the paper adopts Arksey and O'Maley's protocol (2005) and its subsequent refinements (Levac et al. 2010; Armstrong et al. 2011; Daudt et al. 2013), modifications were necessary. Discourse and textual analysis techniques were used to alleviate residual biases in charting (stage four) and summarizing the results (stage five), thereby strengthening the final database (Titscher et al. 2000; Fairclough 2003). It is important to recall that the abstracts were read in the selection stage, as Arksey and O'Maley (2005) recommended.

The extraction concentrated on top five online knowledge repositories: (i) Scopus; (ii) Web of Science; (iii) Scielo; (iv) Google Scholar, and (v) Open Alex. Data files were imported directly from portals, except for Google Scholar and Open Alex, which were mediated by Harzing's Publish or Perish 8 application and the Open Alex API, respectively. Files were extracted in RIS format and processed in Zotero software. All duplicates were removed in Zotero. The consolidated data

file was analyzed in two different software. Bibliometric/network analysis used the VoSviewer application (version 1.6.20). Text analyses based on the abstracts and author titles were included. Refined text analyses were processed in the Iramuteq software (version 0.8/alpha 7). The procedures in Iramuteq focused on metrics to understand the specialized debate on the object, as well as supporting the study selection process (stage three) and data charting (stage four).

Identifying Relevant Studies

The guiding question for the scoping review is two-sided. The first consolidates the object “Brazilian South-South Cooperation” in the research process. The second establishes the lenses to be used in processing and searching documents, the “empirical foundation”. In the scientific method, hypotheses are statements that usually correlate at least two variables. Theories are a set of interconnected hypotheses (Nagel 1961). To be valid for debate in the scientific process, hypotheses need to be falsifiable and allow empirical testing. If a hypothesis cannot be refuted it is closer to a dogmatic postulation, usually characterized by generic conjectures, elastic claims or unobservable propositions (Popper 2002).

The identification of documents focused on five electronic databases: Scopus, Web of Science, Scielo, Google Scholar, and Open Alex. Assuming that authors can define whether their own works belong to the “Brazilian South-South Cooperation” literature, all extractions used this search term. The preferential search focus was the document title, abstract, and author keywords: if the document had the term “Brazilian South-South Cooperation” in at least one out of three fields, it was automatically included in the extraction list (see Supplement II). Several documents either focused on relations among the southern states of the Brazilian Federation or discussed experimental science without any relation to the object whatsoever. Eighty-eight duplicates were also excluded. The consolidated database consisted of 349 documents (Table 1).

Table 1 – Stage 1: Identification of Documents

Data Source	Extracted	Excluded	Total
Google	13	4	9
Scielo	114	14	100
Scopus	117	1	116
Web of Science	102	3	99
Open Alex	126	13	113
Total	472	35	437
Total (no duplicates)	-	123	349

Source: Elaborated by the authors.

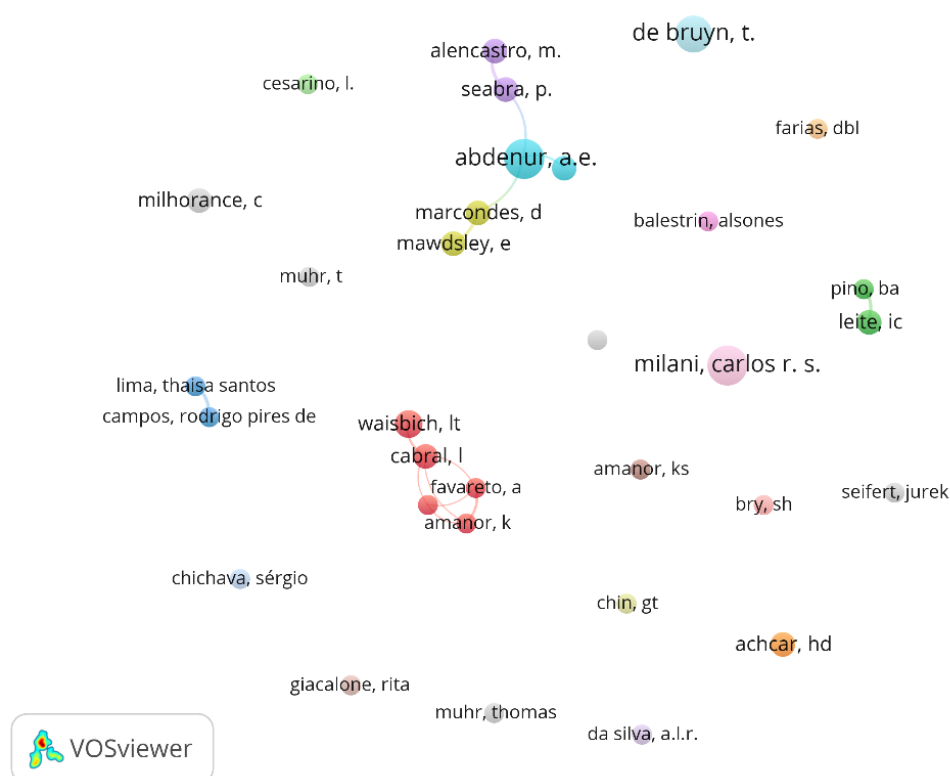
Selecting the Studies

Co-authorship is regarded as an important metric to indicate the quantity and quality of collaboration among scientists. The analysis of co-authorship networks unveils how relations between scientists evolve over time and enables discussion of their roles in one or more networks (Uddin et al. 2012). Co-authorship analysis also provides insights to discuss the quality of publications (impact) and the characteristics of collaboration among scientists, such as participation in international or national networks (Glänzel 2001). In the field of Brazilian Science and Technology, for example, the analysis can expand from scientists to organizations or countries, an important metric for guiding resource allocation and other policy decisions (McManus et al. 2021; Fonseca et al. 2016).

Although evidence on the impact of co-authorship in specialized literature is an important indicator for identifying multiple patterns of scholarly collaboration, its significance remains subject to debate. Some provide evidence on the positive relation between co-authorship and individual scientific productivity (Ductor 2015), while others argue that the relation widely varies among countries, fields and the national citation impacts (Glänzel 2001). Nevertheless, authors conclude that on average, international co-authorships do result in more cited papers when compared to publications resulting exclusively from national collaborations (McManus et al. 2021; McManus et al. 2020; Glänzel 2001).

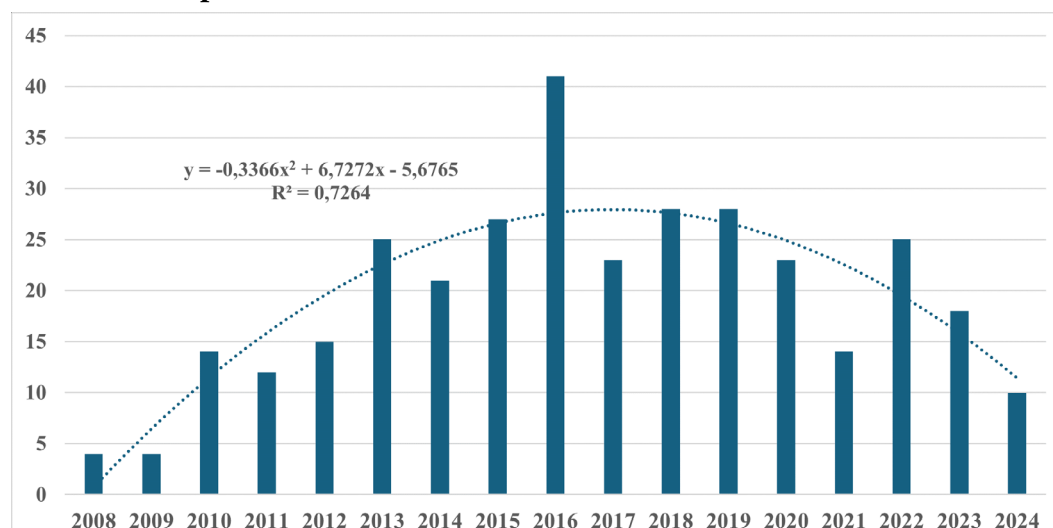
Co-authorship analysis of the 349 Brazilian South-South Cooperation references did not return an acceptable level of collaboration, even after the minimum number of publications was lowered to two per author/co-author (fractional counting). Figure 1 portrays an overall absence of co-authorship among prominent scientists in the field, who usually publish as sole authors or in limited two-author collaborations. Considering the high level of specialization on the subject matter, some authors were expected to mediate among different nodes, in “small world” types of networks (Milgram 1967).

In Figure 1, clusters are isolated to an extent that many individual authors and clusters were unrecognizable, opposed to the overall trend of growth in national and international collaboration in social sciences (Henriksen 2016). Resulting in a co-authorship network of 32 authors, Figure 1 relies on fractional counting and the threshold of two publications per author. The evolution of publications within the field of Brazilian South-South Cooperation between 2012 and 2022 reveals that publications from central authors are at least six or more years old, while only four authors have recent publications in the field.

Figure 1 – Co-Authorship Analysis in BSSC

Source: Elaborated by the authors.

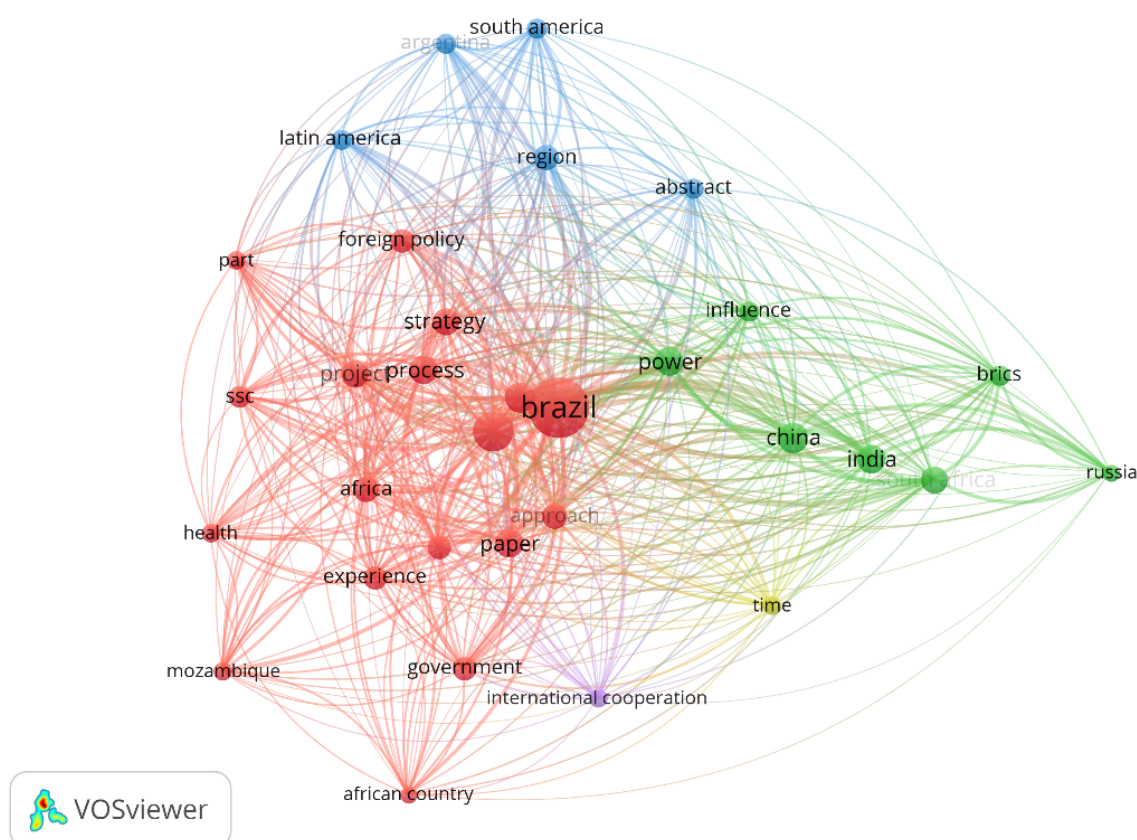
In terms of number of publications and time series distribution, a trend of decline is distinguishable, peaking on 2016-2017 for the selected time-period. Considering the full dataset of 349 entries from 1976 to 2024, either the low number of publications or their availability in the early 2000s would restrict the interpretation of the modelling effort. Therefore, the analysis privileged the 2008 to 2024 period, which excluded 17 documents. Graph 1 illustrates a concave down trend and the model equation.

Graph 1 – Number of Publications (2008-2024, n=332)

Source: Elaborated by the authors.

A co-occurrence map based on abstracts was also produced (Figure 2). The process resulted in three clusters. In the first cluster, South-South Cooperation is related to “project”, “process”, “approach” and “experience”, as well as thematic areas (eg. health) and country/region case studies (eg. Mozambique). The power-politics trait of South-South Cooperation appears in the second cluster in deeper detail and directly linked to the “BRICS” global South strategy to “influence” international politics. The third cluster highlights the importance of regional studies with “america”, “south america” and “latin america”.

Figure 2 – Co-Occurrence Map in BSSC: Abstracts and Titles (n= 303)



Source: Elaborated by the authors.

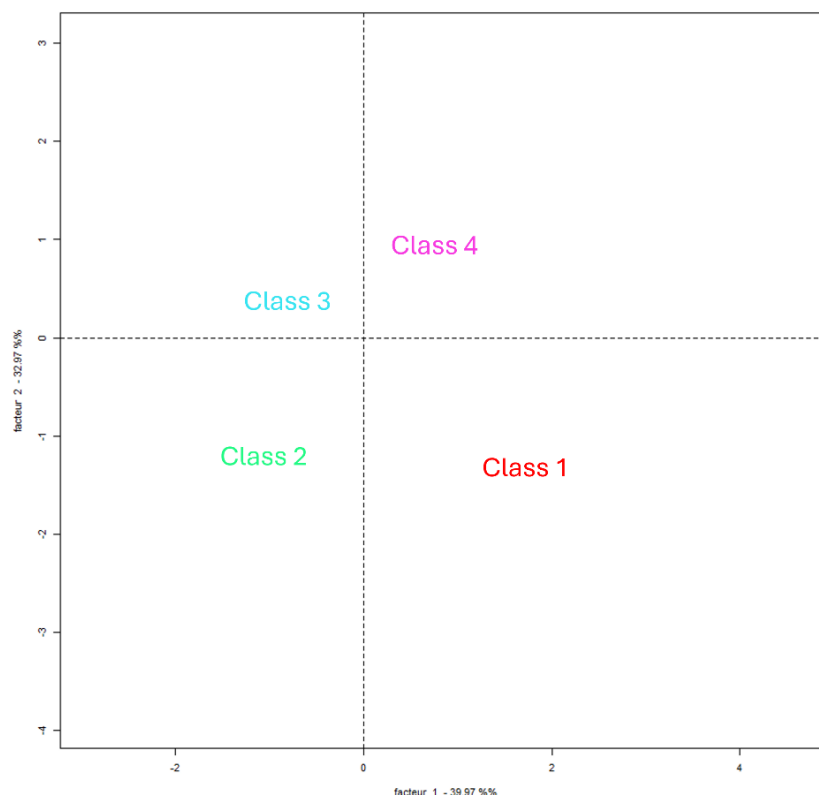
A detailed discursive textual analysis was needed to dig deeper into the interpretation of the research agenda. Texts are multi-functional phenomena that provide meaning in a social context, conceived as representing aspects of the world, enabling social interaction, and identifying relations among segments of words and phrases at the same time (Fairclough 2003). Representation allows the depiction of physical, social, and mental worlds. As an enabler, texts connect people with social practices or action, thereby providing meaning of how words and phrases should be understood. From the multiple functions of text, it becomes clear that text and context are intertwined. “Text” and “speech” could be understood as a form of “language in use”. Any attempt to analyze “text” must consider its meaning as a “social practice”, or a

dialectical/recursive relation between the discursive event in a text form and the social structure that surrounds the discourse (Titscher et al. 2000).

Given the characteristics of the textual/discourse analysis, exploring the article abstracts is indistinguishable from examining the field of studies that embrace the selected documentation. The written scientific production in the form of articles, papers, books, etc., is understood as a representation of a meaningful social phenomenon, which evolves through time as actors interact (Titscher et al. 2000). Discourse and textual analysis methods, though, are more linked to the qualitative techniques of content analysis (Moraes and Galiazi 2006). The standard method is frequently marked by the classification and clustering of textual units that exhibit the same meaning. Nonetheless, it is in the interpretation of meaning for sub-textual units and the corpus where the difference lies for content, discourse, and textual/discourse analysis (Medeiros and Amorim 2017). Textual/discourse analysis is preferred, as it allows both description and interpretation of contents (Moraes 2003).

Analysis frequently resorts to the assistance of software designed to process large segments of text. Most software offers segmentation and clustering of text segments, as well as pre-defined metrics to understand and interpret both the micro and the macro levels of the corpus. The Iramuteq software is an example of an open-source processor that provides several options for analysis, including: (i) basic frequency statistics of textual elements; (ii) classification and clusterization of text segments by Correspondence Factor Analysis (CA) and Descending Hierarchical Classification; (iii) similarity analysis (Souza et al. 2018). Since textual analysis is highly sensitive, forty-five studies deprived of abstracts were excluded. Ten studies were also excluded because they either did not address the object or were related to intra-state cooperation in the Brazilian Federation.

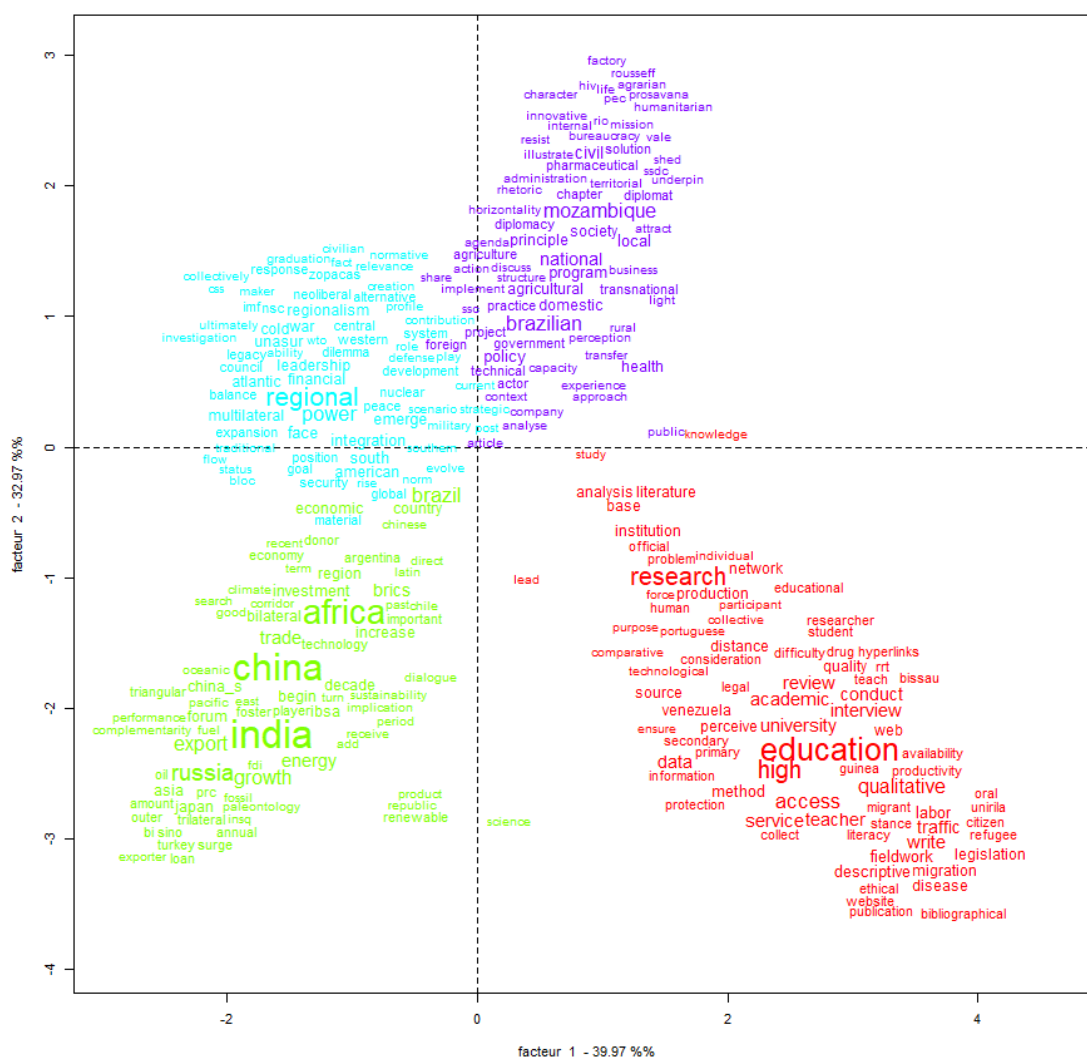
The corpus was reduced from 349 to 294 abstracts, with 48,386 occurrences and 4,212 forms, and a mean number of 165.14 forms per abstract. The analysis also displayed acceptable number of hapax ($n=1,778$, 3.67%). CA allows a visual representation of the dependencies among the emerging clusters (or classes), represented by classes, active words, or supplementary words. Here, the AFC is a two-factor solution for the overall variation, which appears in Figure 3 as four distinguishable groups. In the upper left quadrant, Class 3 displays low dependence on Class 2, and is also moderately explained by factors 1 and 2. In the lower left quadrant, Class 2 has low dependence on classes 1 and 3, and is moderately explained by factors 1 and 2. In the lower right quadrant, Class 1 is highly independent from the other three classes and is moderately explained by factors 1 and 2. Finally, Class 4 is also highly independent from other classes and is moderately explained by factors 1 and 2.

Figure 3 – Factor Analysis of Abstracts: Classes (n=294)

Source: Elaborated by the authors.

It is important to remark that “classes” are based on the most representative active forms, according to the χ^2 scores. Even so, they do not grasp the whole variation in intermediate categories. It is visible in Figure 4 that intermediate forms may assist in establishing the dependency patterns among classes. In CA, classes positioned in different quadrants are regarded as independent. If classes are in the same quadrants or considerably close to lines/columns, they are considered dependent (Verastzo et al. 2018). It is equally important to note that classes are frequently named after their most representative active forms. Observing Figure 4, the top nouns for each class are: Class 1: Education, Research, Access, Qualitative; Class 2: India, China, Africa, Russia; Class 3: Regional, Power, Integration, South; Class 4: Mozambique, Civil, Policy, Program.

Figure 4 – Factor Analysis of Abstracts: Active Forms (n=294)



Source: Elaborated by the authors.

Given the criteria for interpreting the CA results, three distinguishable groups appear for the dependence analysis. Group A displays a degree of independence among the intermediate categories. Group B is marked by the dependence between the intermediate categories. Table 2 summarizes the results regarding the type of association.

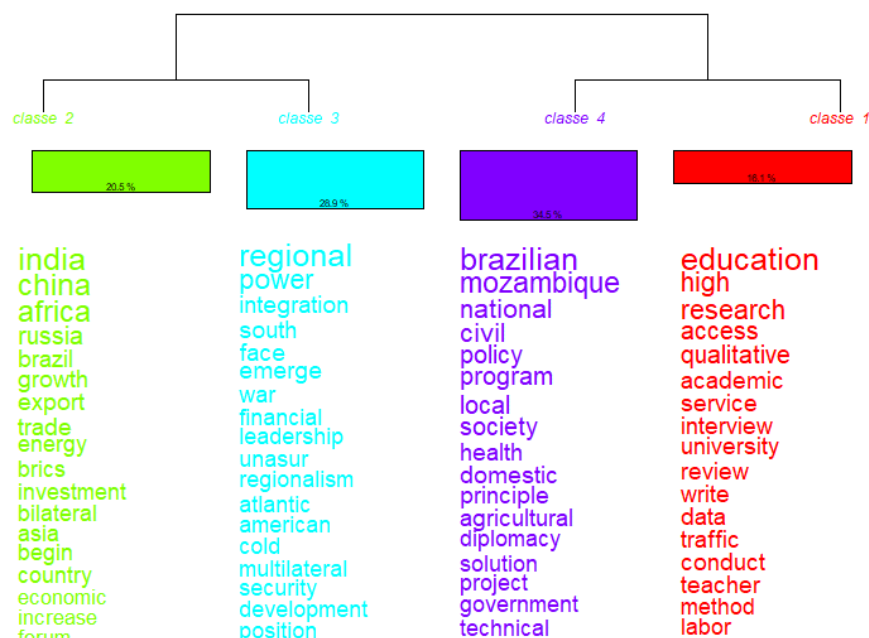
Table 2 – Types of Association Among Intermediate Categories (n=294)

No	Group	Intermediate Categories	Association	Intensity
1	A	1 and 2	Independence	N/A
2	A	1 and 3	Independence	N/A
3	A	1 and 4	Independence	N/A
4	B	2 and 3	Dependence	Low
5	A	2 and 4	Independence	N/A
6	A	3 and 4	Independence	N/A

Source: Elaborated by the authors.

A Descendant Hierarchic Classification was also produced. In total, 5,500 forms were analyzed, representing 1,362 text segments. The resulting DHC captured the variation of 1,291 text segments, or 94.79% of the total text segments. Figure 5 exhibits the most stable structure for the dendrogram, which consists of one main ramification, composed of Classes 2 and 3 on one side and Classes 4 and 1 on the other. It is important to stress that the closer the classes, the higher the contextual affinity for discussing regrouping. It is standard procedure to name each class after the interpretation of the fifty most representative χ^2 scores for the sub-class. Here, Classes could be renamed as: Class 2: Emerging Power Development Cooperation; Class 3: Regionalism in Latin America; Class 4: Design and Implementation of Technical Cooperation; Class 1: Cases and Practices on South-South Cooperation.

Figure 5 – Factor Analysis of Abstracts: Dendrogram (n=294)



Source: Elaborated by the authors.

Reviewing CA and DHC results, the four-class structure was sustained. Even the low dependence between Class 2 and 3 did not prove satisfactory for merging both classes. The decision to keep the four-class structure seems consistent with other conceptual structures about the state of the debate on SSC, such as the one advanced by IPEA. In IPEA's 2019-2020 COBRADI report (Instituto de Pesquisa Econômica Aplicada 2022), the SSC conceptual structure was tridimensional, consisting of political, economic, and technical realms. Here, a four-dimensional conceptual model fuses the emerging powers' political/economic relations in one cluster, while the remaining clusters are split among Regionalism in Latin America, cases/practices, and design/implementation of interventions.

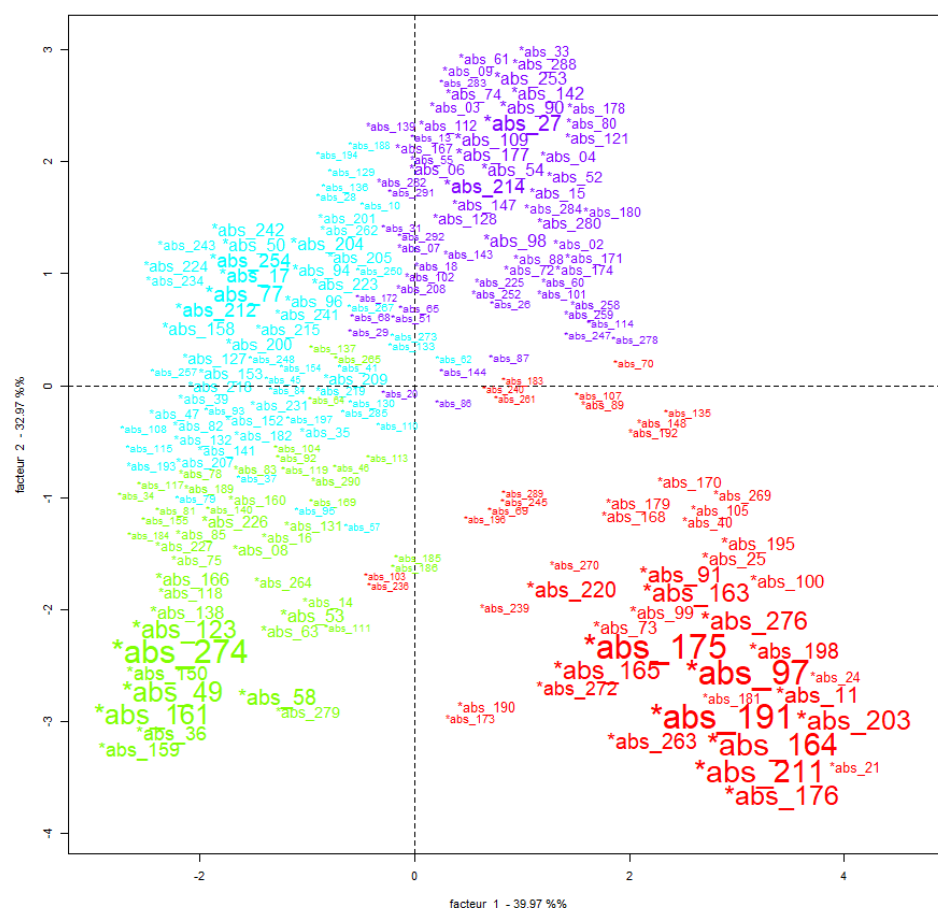
The final four classes, their overall characteristics, and their typical text segments are displayed in Supplement III. The text segments per class were limited to 50. In addition, the chi-square test (χ^2) was the basis for creating a list of active forms. The selection of typical text segments per class follows the associative strength between the active form and the class. This associative strength is analyzed when the test is greater than 3.84, a $p < 0.0001$ (Souza et al. 2018).

Selecting Studies

Both bibliometric and text analysis provided solid parameters to understand the context in which the studies were produced, as well as metrics to visualize general trends in the field of Brazilian South-South Cooperation. Textual/discourse analysis, though, resulted in practical criteria to segment the studies and substantiate the selection process for the scoping review. One of the major criticisms for scoping reviews is the wide range of methodological options implemented by reviewers (Pollock et al. 2023; Pham et al. 2014), which may result in interpretive, conceptual or reporting biases (Ballard and Montgomery 2017).

A possible way to avoid bias in the selection of studies for a systematic review is to focus on “(...) grouping of studies and selecting for meta-analysis only those subgroups in which the intervention, context and outcomes were sufficiently similar.” (Ballard and Montgomery 2017, 106). A similar logic could be applied to scoping reviews in a broader sense, since the weight for such studies is mostly on classification, identification of gaps and differences/similarities. Given the analyses produced in previous sub-sections, it was justifiable to make a first cut in selecting the studies according to the four clusters produced in textual/discourse analysis: (i) Cases and Practices on South-South Cooperation; (ii) Emerging Power Development Cooperation; (iii) Regionalism in Latin America; (iv) Design and Implementation of Technical Cooperation.

The resulting database of 294 studies was segmented according to the two-factor solution, depicted in Figure 6 with the codes *abs_1 to *abs_294. The distance from each abstract depends on the classification of their text segments, which in turn depends on the associative strength of their active words according to the four classes. Putting it bluntly, similar articles tend to group around similar active words that compose their text segments. If there are no overlapping classifications among classes, a study can be considered unique to a class.

Figure 6 – Factor Analysis of Abstracts: Text Segments (n=294)

Source: Elaborated by the authors.

Based on the idea of “belonging” and “uniqueness to a class”, studies were distributed amongst each class. To quantify the ideas of “belonging” and “unique to a class”, selection considered the ranking score automatically generated by Iramuteq to position the abstracts in each class. The ranking goes from zero (article does not relate to the class) to nine (typical article for the class). For all classes, the threshold for selection was three. In Class 1, 27 studies were selected, while in Class 2 the number reached 29. In Class 3, 53 made the list. As for Class 4, 73 studies were selected. Out of 182 documents in the four classes, 10 were excluded because they were unavailable or incorrect concerning the object. The final database contained 172 documents.

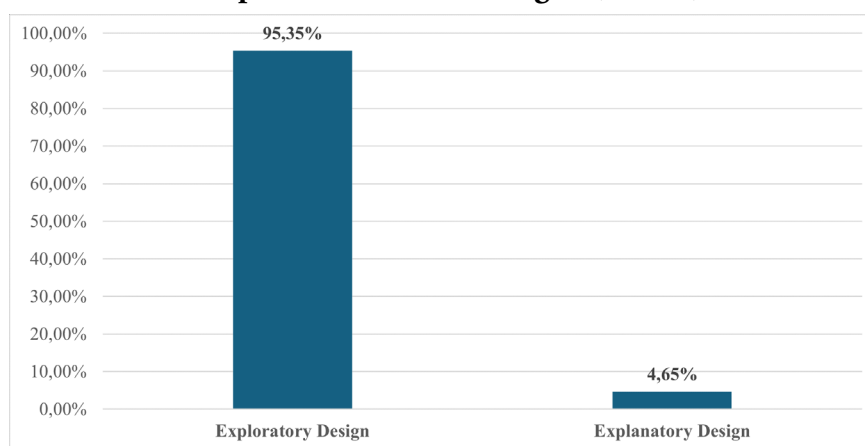
Charting the Data and Summarizing Results

The data charting process followed Arksey and O'Maley (2005), but with adaptations for non-experimental research. The resulting matrix in Supplement V contains eight variables of interest to the proposed research question (Thematic Cluster; Authors; Year; Object of Study; Objective; Methodology; Data Sources; Results). One of the variables was pre-filled, based on the cluster classification from textual/discourse analysis. The bulk of studies in the final database

was exploratory research, reaching 95.35% of the total (164 studies). In this exploratory research group, 52 were single or multiple-case studies (Supplement IV).

Explanatory studies are rare in the field of Brazilian South-South Cooperation. Likely due to the novelty of the emerging-power phenomenon, almost all reviewed studies are non-experimental research designs, with one deviant – and rare – exception (Apolinário Junior 2016). The bulk of production in the field gravitates around proposals that focus on “mapping”, “exploring”, “contributing”, “analyzing”, among others, indicating a clear preference for exploratory and qualitative research designs. In other words, they focus on describing and understanding BSSC and on non-causal research proposals. Out of the 172 studies reviewed, only 08 can be considered to have employed explanatory research designs (Graph 2). In addition, the variables “object”, “objective”, “method”, “data sources”, and “results” in the review matrix were filled in with the corresponding excerpts from the articles, to reduce bias and subjectivity in the processes of charting and interpreting (Supplement V).

Graph 2 – Research Designs (n=172)



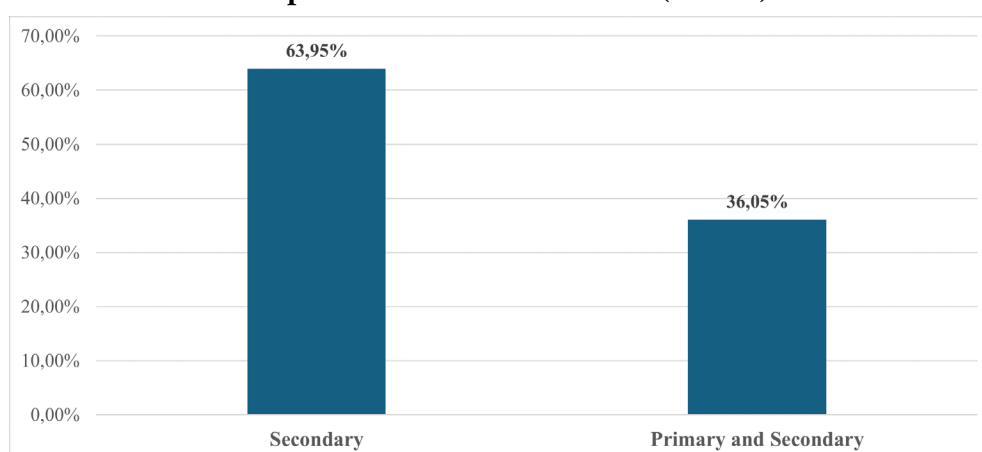
Source: Elaborated by the authors.

Many studies are exploratory either because they intend to shed new light on specific research topics (Schuberth 2019), or they bring data and insights that may lead to new research hypotheses or agendas (Abdenur 2014). Other studies also focused on examining the appropriateness of theories and hypotheses already established in other fields, such as those falling into the tradition of “policy transfer” (Oliveira 2021; Sá and Silva 2022). Several exploratory studies also embrace certain theoretical standings or “adopt” assumptions that narrow down methodological choices and data selection (Milani et al. 2017).

The high percentage of papers using methods that rely on secondary data for reaching their objectives is worrisome (Graph 3). This finding is even more problematic for exploratory studies, which tend to focus on description, understanding, and the generation of new ideas and hypotheses. A total of 103 exploratory studies resort exclusively to secondary data, accounting for almost 60% of reviewed studies. The situation constitutes a conundrum in 11 single-case or two-case studies, which

exclusively use secondary data (Seabra and Abdenur, 2018). Oftentimes, access to official documentation, government representatives and field work in multiple countries is mentioned to be difficult, prohibitive or simply not possible. However, if the whole point of a case study design is to use “(...) as many sources as possible” (Yin 2008) to enrich the understanding of a phenomenon, only resorting to one type of data source may significantly reduce the exploration potential of a research proposal.

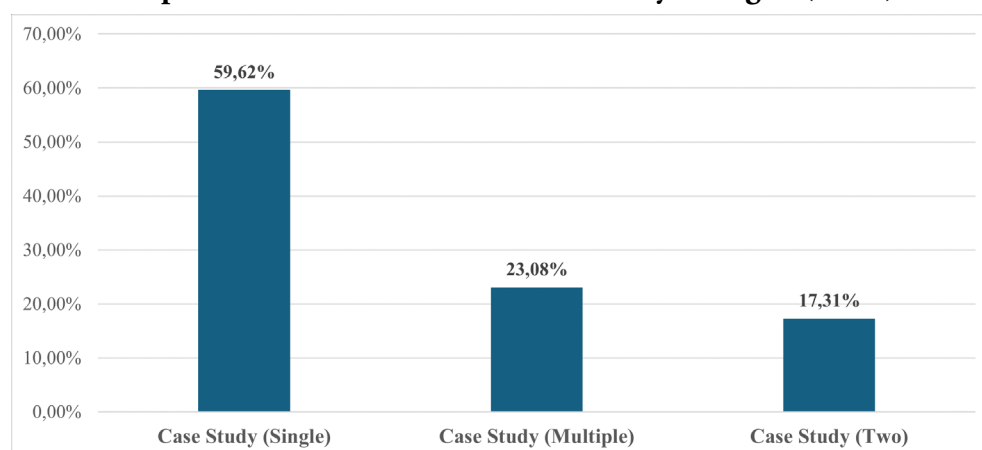
Graph 3 – Data Sources Used (n=172)



Source: Elaborated by the authors.

In the largest group of exploratory studies, case studies constitute a distinguishable and preferred method among authors. Case studies may be focused on projects (Shankland and Gonçalves 2016), organizations (Agostinis and Parthenay 2021), cities (Harrison 2015), or countries (Cassiani 2018). Their common methodological characteristic is setting a unit of analysis to implement an in-depth exploration of one case (Marcondes 2021) or also the comparison among two or more cases (von Soest et al. 2006). As mentioned before, single case studies are the majority, representing almost 60% of the reviewed studies, as depicted in Graph 4.

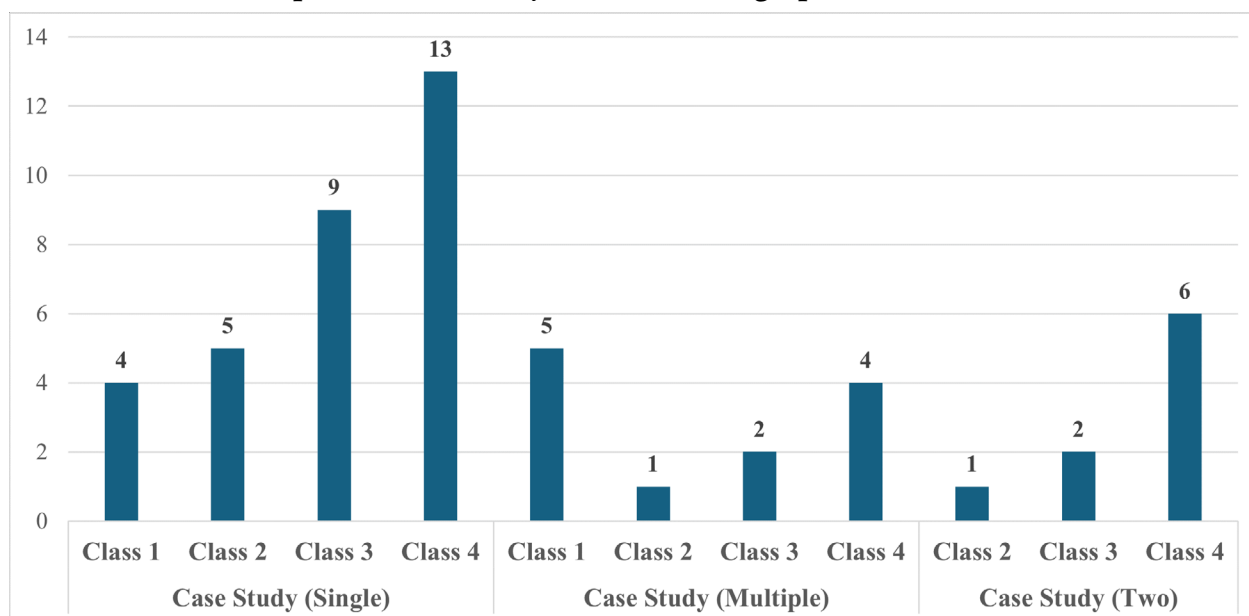
Graph 4 – Characteristics of Case Study Designs (n=52)



Source: Elaborated by the authors.

Since case study designs represent nearly a third of exploratory studies, it is worth focusing on their objectives, characteristics, and empirical foundations. The first approach to understanding the production of case studies is by using the four-class clustering unveiled by the textual/discourse analysis (Class 1: Cases and Practices on South-South Cooperation; Class 2: Emerging Power Development Cooperation; Class 3: Regionalism in Latin America; Class 4: Design and Implementation of Technical Cooperation). Taking no account the different numbers of studies assigned to each class/cluster, classes 4 and 1 represent 44% and 19% of the total case studies, respectively. Most of the studies falling into these categories focus exclusively on the Brazilian technical cooperation with Southern countries, as well as the Brazilian educational cooperation/internationalization of higher education, as illustrated in Graph 5.

Graph 5 – Case Study Research Design per Class (n=52)



Source: Elaborated by the authors.

Since case studies frequently allow cross-case comparisons, and bearing in mind the discursive importance of South-South Technical Cooperation (SSTC) to Brazilian South-South Cooperation, it is valuable to examine methods, data sources, and main results in greater depth. The number of studies that deal with topics closer to SSTC reach thirty-nine, among the fifty-two case studies identified. When studies are reorganized according to the unit of analysis, a first problem clearly emerges. Several studies focus on one or more SSTC projects (Esteves et al. 2016; Schubert 2019; Achcar 2022), while others focus on Brazilian institutions that provide SSTC (Gutiérrez et al. 2021), on the relation between SSTC and Brazilian Policies (Milhorange and Bursztyn 2017; Melo et al. 2018; Zanella and Milhorange 2016), on International Organizations (Marcondes and De Bruyn 2015), on the comparison between Brazil and other Southern countries in the provision of SSTC (Scoones et al. 2016; Muhr 2019), or even a Southern city in the context of

SSTC (Harrison 2015). Supplement IV summarizes all SSTC case studies, according to their unit of analysis.

The different units of analysis would naturally limit any cross-case comparisons. In addition to that difficulty lies the fact that even studies that use the same unit of analysis apparently rely on different data collection methods. Almost all case-studies that focus on Brazilian SSTC use interviews with government officials and other people involved in the project as the main source for primary data collection. Even ignoring the fact that many use questionnaires with open-ended questions, the practical difficulty lies in the fact that posing standardized questions, questionnaires, or even the description of variables is rarely the norm. Without such methodological background, it is virtually impossible to produce a synthesis. The last column in the table of Supplement IV also includes the primary data source used for all case studies which relied on them, when available.

A notable exception for comparison across cases are studies that fall under the umbrella of the “policy transfer” framework. Even though the debate on lesson-drawing dates to the seventies and eighties (Rose 1991), a popular approach crystalized with Dolowitz and Marsh (1996), who defined the concept of policy transfer, and identified who transfers policy and what is transferred. The same authors also proposed a framework, which in essence is an evaluation matrix containing eight variables formulated as questions (Dolowitz and Marsh 2000). The matrix has been widely used, criticized, and progressively “perfected”, leading to a plethora of incomparable case studies during its life cycle (Mossberger and Wolman 2003). The point, though, is that policy transfer was not designed as a model or theory, but as a heuristic tool (Dolowitz and Marsh 2012). As such, the framework is a collection of “rules of thumb” to assist the understanding of the “internationalization of public policies” phenomenon (Stone and Moloney 2019).

This framework has gained traction in the field of Brazilian South-South Cooperation (Sá e Silva 2022). Some authors contend that even though the roots of the framework lie in the experience of developed countries, the rationale for using the heuristic is “The inclusion of the empirical analysis of policies migrating from the South is relevant from a theoretical perspective, insofar as it allows us to explore new dynamics, agents and mechanisms involved in policy transfers. In addition, it opens even more opportunities for comparison.” (Oliveira and Milani 2022). However, the inevitable question for this reasoning is: how can there be comparison if the underlying rules of thumb progressively change *pari passu* the production/accumulation of case studies? (James and Lodge, 2003) Does the need for “tweaking” or “calibrating” old frameworks (Stone et al. 2020) even make sense in the field of Brazilian South-South Development Cooperation?

This problem was raised in 2011 by Benson and Jordan, who commented that popularizing the framework comes with the risk of over-importing ideas from other fields. Even among the studies falling under the umbrella of “policy transfer”, the incomparability of case studies was also found in this scoping review. Noted by Evans (2009), the greatest shortcomings of the “policy transfer” and their derivatives of “policy diffusion” and “policy circulation” (Oliveira 2021, 5) are the absence of rigorous tools for evaluating whether a policy has been transferred, whether the agents have learned, and how to learn from a successful case.

In addition to not having produced consistent theories yet, the research on Brazilian South-South Cooperation is in decline. Scientific production in the field has followed the predicted Brazilian decline in international affairs (Cervo and Lessa 2014), a trend also seen by the age of reviewed publications. Even though the bibliometric analysis points to a concentration of studies among Brazilian authors, it also indicates a higher impact coming from studies produced by foreign scholars. In the same vein, network analysis shows a scenario of low collaboration among authors in the field, suggesting an absence of common methodologies and collaborative research agendas.

The review points to a conceptual structure segmenting the scholarly debate into two to four distinct clusters. Based on the author's keywords, the bibliometric analysis resulted in a conceptual structure that clearly separates South-South Development Cooperation from other political-economic debates. Co-occurrence analysis built on abstracts depicts three clusters, in which regionalism and power politics are separated from the other topics in Brazilian South-South Cooperation. A refined textual discursive analysis based on abstracts resulted in a stable four-branch conceptual structure. In this conceptual structure, there is a clear separation between studies focusing on regionalism, the political economy of SSC, international development cooperation, and the practice of SSC. All findings are consistent with the conceptual structure presented and discussed by IPEA (Instituto de Pesquisa Econômica Aplicada 2022, 27).

Conclusion

The review unveils that Brazilian SSC studies are exploratory in nature and largely rely on secondary data. Even studies self-entitled as “case studies” are essentially exploratory and non-comparable. Among case studies focusing on South-South development/technical cooperation, the wide variation in the unit of analysis renders impractical efforts to identify trends, compare, contrast or generalize them. Consequently, the empirical foundation supporting the theorization of the Brazilian South-South Cooperation phenomenon offers little support for hypothesis-testing. What would be an alternative to reposition research and rekindle the agenda on Brazilian South-South Cooperation?

At least in the context of Brazilian International Development Cooperation (IDC), the alleged difficulties related to systematic data collection on SSC find little practical support, constituting a misplaced debate. Firstly, the debate is overly focused on IPEA's own experience in structuring national statistics grounded on “big numbers”, which overshadows the alternative hypothesis of whether this statistical system is appropriate for Brazil in the first place (Schleicher 2024). Under the present circumstances, little is learned in terms of what works and what does not (Bry 2017; 2015), the best intervention designs (Schleicher *et. al.* 2022) and what difference the interventions make for Brazilian relations with its partners (Desiderá 2025). A promising way should be to regularly evaluate IDC initiatives using similar parameters to observe trends and propose new hypotheses (Schleicher *et al.* 2022)

Secondly, it is highly questionable that Brazilian official statistics should prioritize expenditures and project/program deliverables, given the small-scale characteristics of Brazilian IDC. Adding to Cobradi's expenditure-based rationale, the 2021 Cobradi Report (Schleicher 2024a) highlighted four other pathways for empirical and inductive research based on existing and widely available data: (i) educational and scientific cooperation, which is still poorly explored in Brazilian International Relations and is by far the largest Brazilian IDC field (McManus et al. 2024; 2021; 2020); (ii) Spill-over effects of the Brazilian Unified Health System (SUS) to nationals from developing (South-South) and developed (South-North) countries; (iii) asylum-seekers, refugees and their relations with Brazilian social policies; (iv) the practical effects of contributions to International Organizations (Schleicher and Barros-Plataiu 2023), which so far has no marker to differentiate expenditures between South-South and the "National Implementation" (Decree 5.151/2004) modalities.

Adding to the debate about data and pathways for research lies the necessary review of research methods in Brazilian International Relations. This paper introduces a research technique widely used in Health Sciences but hardly found in International Relations. As discussed, synthesis reviews are one amongst the many methods that can be used to improve understanding of data, knowledge, people, institutions but, most of all, the state-of-the-art of a field itself (Peters et al. 2020). Another example is the use of Artificial Intelligence, in which source-grounded generative algorithms can assist in converting multiple data sources and formats and creating common ground for advancing research and exploring the available empirical foundations, supporting collaborative hypothesis-testing and theory-making. Regardless of the method used, and underlying the analysis throughout this paper, the research agenda will not advance without common-shared research questions, novel hypotheses and increased collaborative work among scholars from various backgrounds.

Data Availability Statement

The anonymized data supporting the findings of this study will be made available by the corresponding author upon reasonable request, provided that the data are not maintained behind a commercial paywall.

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