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How Different Disciplines have Approached South-South Cooperation and Transfer

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Introduction

The study of South-South transfer is an interdisciplinary undertaking. Although the concept of a geopolitical South is highly questionable, the notion of cooperative efforts among individuals, institutions, peoples and governments of countries that have been labeled poor, developing and currently ‘The South’¹ has awakened the interest of researchers coming from different disciplines in the social sciences. These interactions, and the reasons behind them, have brought enthusiasm to interdisciplinary research on the role of cooperation in education policy. But how have different disciplines, including education, approached South-South cooperation and transfer? Do they acknowledge transfer and cooperation as the same thing? Have they emphasized cooperation or policy transfer in South-South relations? In answering these questions, we reflect on four major disciplinary and theoretical approaches: comparative and international education, comparative policy, international relations, and development studies.

The scholarship of comparative and international education concerns educational borrowing and lending, with significant interest for policy transfer experiences among countries of the South; that is, South-South transfer (Chisholm

Society for International Education Journal, vol. 5, no. 1.

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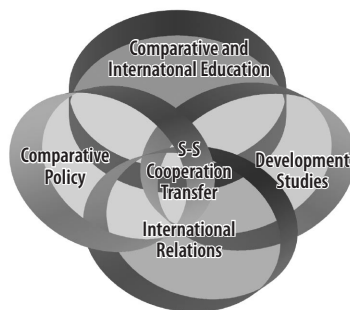
1 By ‘South’ we mean all developing countries in Africa, Asia, Eastern Europe, Latin America and the Caribbean.

& Steiner-Khamsi, 2008). The word transfer itself comes from the field of comparative policy (within the broader field of political science), emerging out of the study of different kinds of “cross-national policy processes”. Within international relations (IR), theorists have, since the aftermath of World War II, dedicated themselves to studying international cooperation. Once the word ‘South’ came to replace the expression ‘Third World’, any kind of bilateral or multilateral collaboration undertaken among countries of the South came to be known as South-South cooperation. Finally, the field of development studies, which is interdisciplinary itself, has paid significant attention to possibilities of South-South cooperation and transfer. Dependency theorists have seen it as a possible source of self-reliance for the South. Development practitioners, many of them working at international agencies have been, especially in recent years, envisioning South-South cooperation as a policy tool to help in local, regional and national development processes. By doing so, they have used South-South cooperation as a means of carrying out South-South transfer, which explains why the expressions ‘South-South cooperation’ and ‘South-South transfer’ came to be used interchangeably (Sa e Silva, 2008). However, there are some differences between the two concepts, for not every act of South-South cooperation entails some kind of transfer (even at the discursive level).

As indicated in Figure 1, we argue that, on the one hand, each discipline has given its own contribution to the study of South-South transfer. On the other hand, the figure also shows that the four disciplines dynamically interact, drawing concepts from each other and yielding some collective understanding of South-South cooperation and transfer.

In this framework, this article will outline how the fields of comparative and international education, comparative policy, international relations and development studies have each approached South-South cooperation and transfer, and will attempt to indicate the existing intersections among those fields.

Figure 1. Disciplinary Approaches to South-South Cooperation and Transfer



Comparative and International Education: Educational Borrowing and Lending

Comparative and international education (CIE) has been enriched by several debates since its inception, which have challenged the status quo in education by envisaging new parameters. In this section, we review the educational borrowing and lending scholarship, understanding that it is the closest theoretical paradigm in the field of CIE that addresses educational issues that pertain to South-South cooperation and transfer. Cooperation in the South has been intensified by the proliferation of references to globalization and the realignment of trading blocks following the collapse of the Union of Soviet Socialist Republics (USSR). With regards to this, *new* cooperative efforts in the South have taken shape, including the Andean Pact (1990), Mercosur (1990) and the African Union (1999). Moreover, *old* alignments such as CARICOM (1973) have been strengthened. We argue that these new collaborative efforts in the South are premised upon the tools of borrowing, lending and transfer; additionally, we note that borrowing and lending approaches to South-South cooperation and transfer usually reflect upon the influence of “economic and political pressure to compare educational systems and to mutually ‘learn’ and borrow from them” (Steiner-Khamsi, 2004a, p. 5).

The core debates behind educational borrowing and lending stem from the role of globalization in the formation of education policies at the national, regional and international levels. The first debate emerges from the neo-institutionalist school of thought, under the guidance of John Meyer, Francisco Ramirez and others. When examining the growth of primary school enrollment, which occurred as a result of the “world educational crises” (Coombs, 1968) of the 1960s, these scholars confirmed that similarities existed across national educational policies of many countries (Ramirez, 2003). Thus, globalization or internationalization was thought to be ‘real’. They further concluded that educational convergence, or the “tendency of societies to grow more alike, and to develop similarities in structures, processes and performances” (Kerr, 1983, p. 3) is taking place, due to the fact that educational policies are becoming isomorphic, or similar in nature.

In contrast, scholars such as Jürgen Schriewer, Gita Steiner-Khamsi and others argue that globalization is ‘imagined’ because global education policies only have the appearance of converging at the policy level. According to these scholars, an externalization process occurs, which leads education policies to be borrowed and then re-contextualized in new settings.

In reflecting upon the phenomenon of convergence, Schriewer and Steiner-Khamsi expand upon Luhmann and Schorr’s (1979) concept of

externalization to support their claim that educational policy convergence is discursive. In other words, systems are self-referential. Externalizations or references to other systems (like education) function as a last source of authority (Luhmann, 1990; Luhmann & Schorr, 1979; Schriewer, 1990). Steiner-Khamsi (2007) observes that there are two forms of externalization. Firstly, the reference to scientific rationality; policy makers, in justifying and legitimating lessons from elsewhere, often evoke cross-national analyses to contextualize and frame policy issues within international standards or best practices. A second form of externalization is the selective policy borrowing and lending from effective educational systems that are referenced in cross-national analyses. Externalization encompasses policy borrowing and lending and can be seen as the first frame to conceptualize South-South cooperation and transfer in education.

Externalization takes place when an external authority is evoked to justify the implementation of a policy that would have been otherwise controversial at home. Therefore, the act of lesson-drawing from abroad is used in justifying a contentious policy (Steiner-Khamsi, 2002). Externalization is *not* policy mimicry or copying, although these may be a consequence. Externalization highlights a positive policy experience and determines how that experience is best re-contextualized. Therefore, the voluntary adaptation of a policy does not signal convergence; instead, it is a byproduct of educational borrowing and lending.

Policy borrowing and lending scholarship recognizes that cooperation has always existed in the South and has sought to highlight its positive experiences. It acknowledges that similarities are the result of the efficacy of indigenous cooperation. But questions remain: is convergence the result of the efficacy of cooperation? Are countries converging? While a thorough examination of these questions is not permitted here, they have been the basis of the debate as to whether or not globalization is real. However, implicit in the “semantics of globalization” (Schriewer, 2000, p. 330) are reasons that have given rise to greater cooperation in the South. Today, that cooperation is engendered by the proliferation of international references and agreements (e.g. Education for All, Millennium Development Goals, the Fast Track Initiative) and numerous international and regional conferences. In order to take advantage of these, nation-states are using “flags of convenience” (Lynch, 1998), “phony borrowing” (Phillips, 2004), and “policy mimicry” (Ganderton, 1996) to attain financial support for projects. In many instances, policy borrowing and lending becomes an effort that is linked to “international knowledge banks” (IKBs)

(Jones, 2004; Jones & Coleman, 2005). IKBs “monitor a nation’s development, report on possible setbacks, legitimize intervention, secure funding, and eventually transplant ‘best practices’ from one nation to another” (Steiner-Khamsi, 2007, p. 1). These practices are treated as a “public good” by IKBs (Stiglitz, 2000, p. 29), creating the ideal setting for policy transfer to occur within the global South. As developing countries are incited to play a ‘cat and mouse game’ to catch-up, they are left with no other choice but to cooperate amongst themselves. Cooperation often gives the illusion of convergence since structures, processes and performances appear to be similar across nation-states.

On the other hand, neo-institutionalist arguments on educational convergence center on the “increase in the common education principles, policies and practices among countries with various characteristics” (Chabbott & Ramirez, 2000, p. 173) that occurs as official models of education become similar at the nation level. For Steiner-Khamsi and Stolpe (2006), the explanation often cited in the convergence debate is that:

Once the barriers for global trade are eliminated, anything can be imported and exported, including educational reforms. Since the trajectory of that trade tends to be unidirectional—transporting educational reforms from high-income to low-income countries, and rarely the other way around—educational systems in different parts of the world are increasingly becoming similar. (p. 2)

Externalization theorists hypothesize that there are four stages—cross-attraction, decision, implementation, and internalization or indigenization—that a country may experience when it borrows or externalizes policies (Phillips, 2004). However, countries borrow and lend policies for various reasons, including political change, systemic collapse, internal dissatisfaction, negative external reviews, new configurations and alliances or the innovation of necessary knowledge and skills in the aftermath of upheaval (for example, genocide) (Phillips, 2004; Phillips & Ochs, 2004).

Although educational policies from a particular context might be referenced in another, the core tenets of convergence—emulation², elite

2 Emulation, or “policy band-wagoning” (Ikenberry, 1990), occurs when nation-states borrow and adapt structures and policies from other nation-states (Siegel & Weinberg, 1977; Steiner-Khamsi, 2004b). Emulation entails looking abroad for best-practices and solutions, and using one or more nation-states as archetypes. Bennett (1991), Phillips (2004), and Steiner-Khamsi (2004b) argue that it is natural for states to look abroad for quick-fix solutions, especially during a state of crisis.

networking³, penetration⁴ and harmonization⁵—can be reformulated and perceived as educational policy references that are borrowed or lent among countries (Bennett, 1991). In other words, the similarities that exist across nation-states are derivations that are based upon references and are not the result of the efficacy of education convergence or isomorphism. For Steiner-Khamsi (2004b) and others, these tenets are not the byproducts of convergence per se, but are the core attributes of policy borrowing and lending.

The borrowing and lending literature *has* paid a great deal of attention to South-South relations, as exemplified by Luschei (2004) and Chisholm & Steiner-Khamsi (2008). This special edition of the Society of International Education (SIE)’s journal is a clear display of interest from the CIE field. Overall, the transfer aspect has been emphasized by the borrowing and lending literature, but it has not formally been differentiated from cooperation. This emphasis on policy transfer is even more acute in comparative policy, as indicated in the section below.

Comparative Policy: Public Policy Transfer

Common linkages between the CIE scholarship and comparative policy studies can be found in attempts to explain phenomena such as educational borrowing, lending and convergence. For policy comparativists, South-South transfer stems from looking abroad for lessons or best-practices, which leads to their eventual transfer. Ikenberry (1990) suggests that the fear of being left behind may trigger neighboring states to stimulate policy transfer. Public policy transfer does not take place in a vacuum and therefore when a country looks abroad for quick-fix solutions, that country is in fact initiating the first stage of policy borrowing and is likely to import the solutions found. It is common during

3 Transnational actors or ‘policy entrepreneurs’ who share common experiences, motivation, expertise and information about problems facilitate *elite networking*. This differs from emulation (but can also result in mimicry and copying) in that it involves a shared experience of learning about problems and the development of a common perspective or “international policy culture” (Ikenberry, 1990, cited in Stone, 2001).

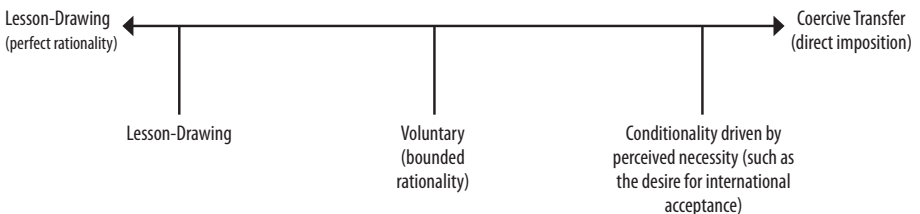
4 Penetration, also referred to as “direct coercion transfer” (Dolowitz & Marsh, 1996) or “external inducement” (Ikenberry, 1990), occurs when nation-states are forced to conform to the actions of exogenous actors. The penetrative process occurs when external actors participate in the “selection of goals, the allocation of costs, and the mobilization of resources and capabilities” in the domestic policy process (Siegel & Weinberg, 1977, p. 67).

5 Harmonization requires transnational actors and authoritative action by intergovernmental organizations. It is driven by interdependence (see Bennett, 1991; Stone, 1999, 2001), and by the reliance upon others to perform tasks to ensure the successful implementation of policies. For example, transnational regimes such as the EU, the African Union and CARICOM exist because their member-states share a long term commitment to governing arrangements and a willingness to sacrifice their autonomy for the good of the larger community (Bennett, 1997).

the process of lesson-drawing for national governments to look at other nations (Dolowitz & Marsh, 2000).

Following Dolowitz and Marsh (1996), we define policy transfer as “the process by which knowledge about policies, administrative arrangements, institutions and ideas in one political system (past or present) is used in the development of policies, administrative arrangements, institutions and ideas in another political system” (p. 5). They employ policy transfer as a generic framework that encompasses a range of related concepts (Evans, 2004; Evans & Davies, 1999). Subsequently, different forms of policy transfer, such as ‘lesson-drawing’ (Rose, 1993), ‘policy band-wagoning’ (Ikenberry, 1990), ‘policy borrowing’ (Steiner-Khamsi, 2004b), ‘policy shopping’ (Freeman, 1999), ‘systematically pinching ideas’ (Schneider & Ingram, 1988) and ‘social learning’ (Haas, 1992; Common, 2004) convey a sense of policy transfer being voluntaristic. Other terms such as ‘convergence,’ (Bennett, 1991; Coleman, 1994), ‘diffusion’ (Majone, 1991), and ‘emulation and harmonization’ (Bennett, 1991) conjure up images of policy transfer as a coercive activity. In this section, we make a distinction between voluntary and coercive transfer and argue that both types of transfer exist in South-South cooperative relations. In Dolowitz and Marsh’s (2000) conceptual framework, they state the reasons why policy transfer occurs and suggest how different actors are involved. Their framework attempts to give an assortment of explanations for policy transfer. Figure 2 shows their perspective on the continuum of obligated transfer.

Figure 2: Continuum of Obligated Transfer (transfer as a result of treaty obligations, etc.)



Note. Adapted from Dolowitz and Marsh (2000, p. 13)

This model distinguishes between voluntary and coercive transfer. *Voluntary transfer* occurs when decision-makers voluntarily engage in transfer following some level of dissatisfaction with existing domestic policy. Logically, there is a “natural tendency to look abroad” (Bennett, 1991) to see how others have reacted to similar policy problems and to seek ideas when

innovation is required. If agenda-setting is taken into consideration, Stone (2001) argues that policy transfer is common, especially after a shift or shock to the existing system (for example, change of government or successful reframing following new evidence) or when the existing policy becomes characterized as a failure. The shift in power causes decision-makers to look outside of their borders for new ideas (Phillips & Ochs, 2004). For example, “a new government will look to international experience to legitimize its new aims” (Dolowitz & Marsh, 1996, p. 347).

Direct coercive transfer occurs through force by an organization, country or supra-national body to make another organization, country or supra-national body adopt a certain policy (Stone, 2001). The role of the IKBs in setting policy conditions in developing countries in exchange for loans under heavy influence by individual countries (most notably the US) are prototypes of this concept (Dolowitz & Marsh, 1996, 2000; Evans, 2004). This was best illustrated during the ‘lost decade’ of the 1980s in Latin America and the Caribbean, where countries were forced to adopt loan conditionalities (fiscal austerity, free markets, deregulation, and privatization) as part of their structural adjustment programs (SAPs).

Indirect coercive transfer, according to Dolowitz and Marsh (2000), is voluntary but driven by an apparent necessity to change policy. Rose (2006) argues that in this case, region A may feel obliged to adopt the policy of region B because region B is an important market for A’s exports; region B’s policy causes ‘externalities’⁶; regions A and B have an interest in working together and harmonizing arrangements (e.g. they share borders and need similar environmental policies); or if a region perceives the need to keep up with international policy developments.

We argue that the proliferation of transfer is a direct consequence of globalization because no nation-state can insulate itself from global economic pressures. However, economic forces are not the only factors advancing policy transfer; the growth of communication and the proliferation of international and transnational organizations have also advanced it. Transfer takes place across time, countries, and policy fields. Additionally, there are different degrees of transfer. These degrees range from wholesale copying of a policy, legislation or technique to various forms of emulation⁷, hybridiza-

6 An externality is defined as a positive or negative policy impact of the importing policy.

7 Emulation assumes a standard basis starting point for best policy, but it allows for adjustment to suit varying needs of the adopter (see Newmark, 2002, p. 6).

tion⁸, synthesis⁹ and inspiration (Dolowitz & Marsh, 1996). Within these varying degrees, transfer can be voluntary, coercive, or a combination thereof.

Naturally, the policy transfer literature is entirely focused on transfer, hence disregarding other types of South-South cooperation experiences. On the other hand, in the field of international relations, cooperation occurs more often than transfer. In IR, the actual occurrence of transfer is not as important as the willingness of countries or institutions to cooperate.

International Rations: Realism, Liberalism, and the New Agenda

Within IR¹⁰ theory, two theoretical paradigms, realism and liberalism, predominated until the end of the Cold War. Realist and neo-realist scholars have conceived states as homogenous actors in an endless process of power struggle for survival and domination. In this framework, real cooperation is unlikely, international organizations are seen as dominated by the interest of hegemonic states and peace is only conditional upon an international balance of power (Mundy, 2007). Consequently, from the realist perspective, South-South cooperation could be a strategy used by the South to secure power; however, such countries would be very prone to being either silenced or manipulated by hegemonic states. It could also be a political strategy employed by regional powers (i.e. China, India, South-Africa, Brazil) to have weaker states under their control, thereby elevating their influence in the international arena. In fact, this is still how numerous analysts and diplomats view South-South cooperation attempts¹¹. Clearly, realism was influenced by the Cold War context, in which South-South cooperation attempts did exist, but were led by a few countries and were clearly limited by the superpower dispute. For instance, all attempts made by developing countries to create a new international economic order¹²

8 Hybridization involves merging two components from different places. Rose (1991) offers the example of using a program from one place and employing different administrative means to suit an adopter with a different political system (see Newmark, 2002, p. 6).

9 Synthesis is similar to hybridization, but involves elements taken from three or more different places (see Newmark, 2002, p. 6).

10 International relations, as an object of study, have been for long scrutinized by both political scientists and historians (Saraiva, 1997). Political scientists in general defend the use of social science methods to build theories of international relations. Historians, in turn, advocate for historiographic accounts of international events, questioning the possibility to build rationalistic theories that will predict the behavior of nation-states and international actors. Therefore, while IR theorists would address South-South cooperation in general as a phenomenon that can be explained by one the established IR theories, historians would tend to analyze each separate South-South cooperation endeavor, focusing on the specificities of each case, on the actors involved, and on the contextual variables at place.

11 For instance, some point the finger at Mercosur, characterizing it as an attempt by Brazil to consolidate its economic and political power in the region.

12 By politically cooperating and voting together at the UN General Assembly and at the United Nations

were boycotted by the power-holders of the time (ul Haq, 1980).

On the other hand, scholars of liberalism defended the possibility that cooperation was real. They conceived states as rational (but still homogenous) actors that made decisions on the basis of their preferences, taking into account trade-offs and second-best options. Cooperation could take place if there were incentives in place and constraints to conflict and war. Therefore, South-South cooperation would flourish if states of the South considered it to be the best option among others—one that would maximize their interests.

A relevant liberal concept for the study of South-South cooperation is the idea of ‘reducing transaction costs’ (Keohane, 1982). Transaction costs refer to all resources that are spent in negotiation efforts including time, personnel, money, prestige and power (which is sometimes lost with bargaining concessions). When explaining why states prefer (or should prefer) multilateralism as opposed to bilateralism, liberal scholars defended that multilateralism allowed states to reduce the transaction costs involved in bilateral negotiations, agreements and dispute resolutions.

The idea of reducing transaction costs can be used to explain cases of South-South cooperation involving more than two countries. One example is the nascent Network of South-South Cooperation for Adult and Youth Education, which is being established by all Portuguese-speaking countries of the South: Angola, Brazil, Cape Verde, East Timor, Guinea Bissau, Mozambique and Sao Tome and Principe. As a result of numerous individual demands, the Brazilian Ministry of Education decided to bring together all these countries in order to jointly negotiate a South-South cooperation strategy for adult and youth education. A workshop was first organized in Brasilia in August 2006 and the formal establishment of the Network is now on its way (UNESCO, 2007). However, apart from reducing transaction costs, we argue that multilateral South-South cooperation offers countries the possibility to go beyond bilateral policy transfers. They can jointly devise policy strategies and tools that draw from the experience of all participating countries and tackle the specific problems of each of them, rather than being limited to acts of transferring best-practices from one country to all the others.

As previously indicated, realism and liberalism dominated most of the theoretical discussions in IR during the Cold War period, but, “the end of the

Conference for Development and Trade (UNCTAD).

Cold War...made the practical potential for international cooperation seem less limited” (Price & Reus-Smit, 1998, p. 265, as cited in Mundy, 2007) and allowed new streams of thought to emerge. Once the constraints created by the Cold War started to fade away, cooperative initiatives re-emerged on a global scale, as exemplified by the numerous international conferences that occurred during the 1990s. Cooperation became a new buzzword. It was a new chapter in the debate of international relations, with the recognition of globalization processes, the acknowledgment of important international actors besides the state, and the vast expansion of this agenda, going beyond traditional debates around international peace and security.

“The new policy agenda” (Edwards & Hulme, 1998, p. 6) created space for new concerns and research topics, making of South-South cooperation a more interesting issue, one that was less likely to fail amidst state power disputes. South-South cooperation has not only re-emerged in the post-Cold War IR agenda; it has been also viewed through new lenses, which, on the one hand, recognizes the international power of the ‘global South’ and, on the other hand, recognize NGOs, think tanks, universities and independent consultants as legitimate promoters of South-South cooperation. This renewed international enthusiasm surrounding South-South cooperation is also related to the promotion of development. With the end of the Cold War, questions that were previously ignored or managed with the aid of the two superpowers became ‘global issues’, to be solved by some sort of “global governance” (Mundy, 2007). Development became one of the top priorities in this “new policy agenda” (Edwards & Hulme, 1998), and, as the following section will explain, it brought with it a renewed interest in promoting South-South cooperation and transfer as a means to improving educational policies and eventually achieving development.

Development Studies: Functionalism, Dependency Theory and Postcolonial Studies

The field of development studies, also known as international development, is interdisciplinary by nature and has consequently been divided by the same paradigmatic debates that have permeated most, if not all, social sciences. Development theories have been directly influenced by functionalism and modernization theories; Marxism, neo-Marxism, and other conflict theories; interpretivism; and post-modernism and all other post-theories that have emerged thereafter. The relevance of South-South cooperation and transfer within development studies and how it is analyzed varies according to the theoretical standpoint adopted beforehand.

To date, functionalist and neo-Marxist perspectives have articulated a

clearer view of South-South cooperation and transfer. This is probably due to the fact that South-South cooperation has been seen as belonging exclusively to the realm of inter-state relations¹³, as indicated above. Considering that both functionalism and neo-Marxism are structuralist paradigms and bear an interest in explaining the *longue durée* (Braudel, 1997), these paradigms may claim South-South cooperation and transfer can be a transformative piece in the world puzzle.

Within the neo-Marxist perspective, dependency theorists in particular have addressed South-South cooperation, viewing it as a possible way out of the exploitative economic relations with the North. For dependency theorists, the “historical developments of the capitalist system have generated underdevelopment in the peripheral satellites whose economic surplus was expropriated, while generating economic development in the metropolitan centers which appropriate that surplus” (Frank, 1971, p. 2). Therefore, development could only occur through radical solutions. By cooperating amongst themselves, developing countries could, from their point of view, avoid the deteriorating terms of trade and circumvent the dependency ties that keep them underdeveloped and subordinate. The book entitled, *Dialogue for a New Order* (Haq, 1980) gathers numerous proponents of the “dependist”¹⁴ approach to South-South cooperation, with contributions from Samir Amin, Mahbub ul Haq and Raul Prebisch. When seen from a dependency theory angle, South-South cooperation appears as an alternative to the status quo, an almost subversive strategy to strengthening developing countries both politically and economically.

On the other hand, very recently numerous development practitioners have started adopting South-South cooperation as a strategic element in their work plans. Using a functionalist framework according to which development is an objective process that can be reached by means of development interventions, those practitioners have seen, under the South-South cooperation label, the possibility to transfer ‘best-practice’ projects and policies from one developing country to another. This would facilitate the achievement of ‘expected results’, as planned in their logical frameworks. Consequently, they have been using South-South cooperation as a means for South-South transfer, to the extent that the two expressions have been used interchange-

13 Sa e Silva (2008) has provided a broader and updated definition of South-South cooperation, conceiving it as “any cooperative initiative between two or more developing countries; it may be carried out by governmental institutions, non-governmental organizations, universities, independent professionals, scholars and researchers”.

14 That subscribes to the premises of dependency theory.

ably (Sa e Silva, 2008). When South-South cooperation is equaled to South-South transfer in a functionalist framework, it becomes a technical concept, a development technique, and loses the political character that dependency theorists had attributed to it. Additionally, when cooperation and transfer are seen as the same thing, South-South cooperation loses its potential to be an innovative mode of international cooperation for development, one that attempts to reinvent development practices and to avoid the failures of North-South cooperation.

In reality, examples of a mix of the functionalist and the neo-Marxist perspectives can be found. There are experiences in which South-South cooperation is promoted by developing countries with the aim of promoting self-reliance and international solidarity. But, at the same time, their practice is guided by the transfer of programs and policies. This is the nature of the cooperation provided by Cuba in education. For instance, Cuba has transferred *Yo, Sí puedo* (an adult literacy program via radio) to countries that are its political allies, such as Mozambique (Lindt, Aksornkool & Heinsohn, 2006). At other educational levels, Cuban cooperation has meant not only policy transfer, but also ‘human resource transfer’, with the transfer of contingents of Cuban teachers to countries such as Jamaica and Namibia (Hickling-Hudson, 2004) and medical doctors to Guyana and Venezuela. Brazil has done the same by sending Portuguese-language teachers to East Timor (MEC, 2005). When this mix of approaches occurs, discourse is politicized but practice is ‘technicalized’.

At the intersection of education and development studies, postcolonial studies also have their say on South-South cooperation and transfer. From their perspective, those processes can help developing countries decolonize their educational systems and break their dependency from educators, researchers and scientists from the North, especially from former metropolises (Hickling-Hudson, 2004). Thus, South-South cooperation and transfer are expected to aid in the decolonization process, particularly in the “forging of radically different relations between nation-states” (Crossley, 2000, p. 324, as cited in Hickling-Hudson, 2004, p. 307).

Conclusion

At the end of the day, one can argue that the intersection among the fields of comparative and international education, comparative policy, international relations, and development studies corresponds to what has come to be known as ‘globalization studies’, and to which virtually every discipline in the social sciences has dedicated research efforts. The global-

ization processes that are driven by interdependence have undoubtedly facilitated exchanges among different nations. The most evident exchanges have been those of a commercial or financial nature, but there is no doubt that exchanges involving the transfer of policy knowledge have also been stimulated as the world becomes more globalized. As communication and transportation possibilities expand, policy transfers are no longer limited to occur from the North to the South, but can also effectively take place from the South to the South.

In this article, we have presented South-South cooperation and transfer at the crossroads. But, where do we go from here? As Figure 1 shows, South-South cooperation and transfer have now come to be used interchangeably. However, we caution against this. Firstly, South-South cooperation is *not* South-South transfer and using these terms interchangeably loses sight of the organic, political and potentially innovative nature of South-South cooperation. Any type of cooperation is a collective process that allows for the learning and sharing of experiences. Secondly, in South-South cooperation there is a myth that cooperation is between 'equals'. That is not true, since the concept of the 'South' is a Western construct; often, parties in the South engaging in cooperative relations are on an unequal playing field. In responding to new definitions of existing problems, countries that are lumped together as 'developing', 'Third World' and 'South' are encouraged by the North to share their experiences. On the other hand, transfer is a process facilitated by externalization (borrowing and lending), which is promulgated by a fear of being left behind. Cooperation may or may not use the process of transfer to engender development.

Last but not least, we must question what type of development is created when cooperation transplants reforms that are not context-specific. Inherent in the cooperation framework is the idea of lesson-drawing. While some cooperative efforts engender transfer, transfer does *not* necessarily engender cooperation. Cooperation is a voluntary process whilst transfer includes voluntary and coercive processes. Countries cooperating may learn from each other, may share similar problems, but contexts differ.

However, research on South-South and South-North cooperation and transfer is almost non-existent. Once developed, it can greatly contribute to sharpening the understanding and use of the terms 'North' and 'South' in all of the four fields of study addressed above.

To this extent, we conclude that South-South cooperation and transfer have now entered the global arena influencing the field of CIE; they have become popularized. Today, when comparativists address educational issues, they can

no longer disregard the existing practices and discourses that have been built around the concepts of South-South cooperation and transfer.

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