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# Mechanisms of defense policy diffusion in South America: evidence from the South American Defense Council

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## Abstract

The South American Defense Council (SADC) aimed to coordinate regional defense policies and build confidence among its members. It diffused practices among its members, such as a standard methodology to report defense expenditures. However, we still need a proper understanding of how it happen. In this article, I contribute to understanding defense cooperation in South America by answering which mechanisms allowed the Council to diffuse policies. Using evidence from the Council's meeting records and process tracing, I show that SADC boosted interactions and set and monitored the implementation of particular practices on defense policies.

**Keywords:** South American Defense Council; UNASUR; International Security; Defense Policy; Defense Cooperation; Policy diffusion.

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## Introduction

In May 2023, South American presidents met in Brasília and discussed the possible reinvigoration of regional integration initiatives (Ministério de Relações Exteriores 2023). It contrasts with the late 2010s when countries like Argentina and Brazil left initiatives such as the Union of South American Nations (UNASUR). The return of such an agenda makes it important to discuss the lessons the region could learn from the intense regional integration processes from the 2000s, when the so-called “Post-hegemonic Regionalism” moved this integration beyond trade and economic issues. The idea was that such integration should also be political and include a wide range of issues, such as social, environmental, and infrastructure policies (Riggirozzi and Grugel 2015; Riggirozzi and Tussie 2012).

At the time, security and defense policies were also included in South American integration processes. The most representative example was the emergence of the South American Defense Council (SADC) at the end of 2008. Created as a council within UNASUR, SADC was seen as a milestone in regional integration processes, allowing South American states to discuss security and defense policies without the presence of the United States. Its main objective was to promote regional cooperation on those issues while also boosting confidence and common visions about international security topics (Vaz et al. 2017; Mijares 2020).

SADC had its first meeting in January 2009 and the last in November 2016. In April 2018, as UNASUR proved unable to act in the context of the Venezuelan crisis, Brazil, Argentina, Chile, Colombia, Paraguay, and Peru suspended their membership in the organization – and, consequently, at the SADC – making it ineffective. Later arrangements, such as the Forum for the Progress and Development of South America (PROSUR), announced in 2019, did not include anything similar to the council, making it a unique case study of a regional initiative for multilateral cooperation in defense and security issues.

More than a unique experience, the SADC also provides lessons to be drawn from its experience. Carvalho (2021a) notes that 128 initiatives were discussed within the SADC, with around 70% leading to outcomes such as seminars, policies, common protocols, and military exercises. It achieved tangible results, such as standard procedures for its members to report military expenditures and inventories, key tools to build confidence within the institution. As a result, policy-makers, advisors, scholars, and those involved in regional defense and security policies can use SADC experiences in future regional defense cooperation initiatives.

This paper, therefore, aims to advance the understanding of such lessons. Most of the existing literature frames the SADC from a security or foreign policy point of view (Fuccille and Rezende 2013; Vaz et al. 2017; Mijares 2018; 2020; Frenkel and Comini 2017; Vitelli 2017). Here, I offer a new perspective by approaching UNASUR/SADC as an international organization (IO) and defense policies as a type of public policy. Then, I use a policy diffusion framework (Jakobi 2009; Faria 2018; Joachim et al. 2008; Dolowitz and Marsh 2000) to answer the question: which mechanisms allowed the Council to diffuse policies?

I answer this question by relying on a theoretical framework discussed by the IO and policy diffusion literature to understand how these institutions can disseminate policies. Methodologically, I analyze SADC primary documents obtained through digital archival research to assess how policies were diffused. Then, using process-tracing, I provide evidence on the use (or not) of policy diffusion mechanisms. Findings show that the Council diffused defense policies in South America by promoting interactions between its members, as well as by establishing common standards to be followed by its members and coordinating their implementation.

This article provides at least three contributions to the literature on South (and Latin) American security, policy diffusion, and qualitative methods. Theoretically, as mentioned, it carries an understanding from the IO and policy diffusion literature, moving beyond the commonly used security frameworks to understand the SADC. As a result, it allows for a new understanding of

multilateral cooperation's mechanisms to influence defense policies in Latin America, a gap yet to be filled in the literature. Instead of discussing the council's emergence and what it implemented, such a framework allows for answering "how" it acted.

In the practical realm, it discusses a past successful defense cooperation experience, aiming to shed light on the scholarly debate on such cooperation and provide insights to plan future initiatives. It becomes especially relevant in a context where regional initiatives are again on the agenda. Methodologically, it draws on Kapiszewski and Karcher's (2021) framework in an attempt to make qualitative research more transparent and replicable by incorporating the Annotation for Transparency Initiative (ATI) framework as much as possible. Documents supporting each finding will be clearly referenced during the process-tracing analysis and publicly available in a repository. These documents will duly highlight pieces of evidence, allowing empirical findings to be verified and replicated.

The remainder of the article is organized as follows. The following section introduces the theoretical framework by discussing how international organizations may produce policy diffusion. Then, I discuss the research design used in this paper. In the fourth section, I provide an overview of SADC's action, test the hypotheses, and discuss the results. Finally, I present some concluding remarks.

## International Organizations and Policy Diffusion

International organizations – and institutions, to a broader extent – emerged from states' converging interests. They proved suitable mechanisms for coordinating current and future intentions and policies, as they provide some degree of predictability to their members on each others' actions (Keohane 2018). In order to accomplish this objective, IOs have been able to participate in states' policy-making processes and, consequently, diffuse policies (Jakobi 2009; Joachim et al. 2008). Through its Defense Council, for example, UNASUR diffused standard methodologies for reporting military expenditures and inventories (Saint-Pierre and Palacios Junior 2014). In this section, I rely on the existing literature to discuss how such influence can take place.

Policy diffusion<sup>1</sup>, understood as the process through which actors adopt policies based on measures suggested or practiced by other actors, increasingly happened as globalization made it easier for states to communicate their practices. At the international level, it usually consists of implementing practices that were either successful in other countries or adopted by "leaders" in a particular area. Such processes are also facilitated if third parties can provide technical or financial assistance to a state, facilitate communication, or coordinate the implementation of some standards (Dolowitz and Marsh 1996; Knill 2005; Marsh and Sharman 2009; Simmons and Elkins 2004). This is precisely what IOs can do.

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<sup>1</sup> The concept of policy diffusion is similar to others, such as policy transfer, circulation, and herding.

As a result, scholars have been discussing the role of international organizations in spreading practices among their members since the late 20th century. Finnemore (1993), for example, analyzed how the United Nations Educational, Scientific, and Cultural Organization (UNESCO) diffused values about science and education around the world. Deacon et al. (1997) studied how IOs can influence welfare policies. Even in the security realm, Fischer (1997) noted the role of the International Atomic Energy Agency (IAEA) in affecting the development of nuclear technologies, while, at the regional level, Oelsner (2009) perceived that the Southern Common Market (Mercosur) influenced security policies in South America. As the literature on policy diffusion emerged, scholars included these organizations as relevant actors in these processes (Dolowitz and Marsh 2000; Marsh and Sharman 2009).

But how do they act? The literature on IOs points to some answers. Finnemore (1993), for example, shows that IO bureaucrats can convince states' policy-makers to implement some kind of policies due to their technical and political authority. Bauhr and Nasiritousi (2012) discuss how rankings and comparisons can convince states to implement some practices. Stone (2004) presents how financial support can induce the adoption of particular standards. Joachim et al. (2008) propose a summary based on three mechanisms: enforcement, by sanctioning actors who do not implement some kind of standard; management, by monitoring policies implemented by its members and recommending new measures; and a normative approach in which IOs use their authority and legitimacy to convince people and policy-makers on particular issues.

While bringing together the literature on IOs and policy diffusion, Carvalho et al. (2021) advance Joachim et al. (2008) framework to a broader extent by looking not only at the policy implementation process, but also at the whole policy cycle. The authors join Jakobi's (2009) typology based on five mechanisms: discursive dissemination, standard-setting, coordinative functions, technical assistance, and financial means. At the same time, they complement such a framework by understanding that IOs can act as orchestrators, opening spaces for state representatives to meet to share and recommend practices.

The first mechanism is thus *discursive dissemination*. It means the bureaucratic staff of the IOs' capacity to disseminate an idea to their members by discursively attributing importance to a particular set of practices. These ideas can become policies after deliberation processes within states. According to Jakobi (2009), this tool is often linked to other categories of instruments. It is illustrative to think that IOs first diffuse an idea and then suggest a specific policy. For example, Finnemore (1993) and Jakobi (2009) mention the role of international organizations, such as UNESCO, in diffusing the idea that good educational and scientific policies can boost states' economic and social development. The United Nations (UN) Sustainable Development Goals (SDGs) are another example of discursive dissemination, since it also consists of ideas spread by the UN, considering the goal to improve people's lives worldwide until 2030. States therefore have such ideas in mind while designing and implementing policies.

Ideas can sometimes become standards to be followed by IO members. This *standard-setting* mechanism refers to IOs' capacity to propose or support recommendations, conventions, rules,

and objectives, which become standards after members' approval. It is then expected that member states will follow such norms due to the authority and legitimacy IOs have to coordinate their actions (Buchanan and Keohane 2006; Carvalho et al. 2021; Zürn et al. 2012). An example of the application of this instrument are regulations proposed by the International Atomic Energy Agency (IAEA) to avoid the proliferation of nuclear weapons (Jakobi 2009). The Organization for Economic Cooperation and Development's (OECD) membership is another example of standards that an IO can impose on states to follow, thus changing policies implemented by those countries that want to join it and move towards more liberal economic practices.

As member states have standards to follow, IOs can act through their *coordinative functions*. It means their capacity to coordinate, monitor, and, eventually, denounce and sanction states in case of non-compliance, ensuring a shared interpretation and application of previously established standards (Carvalho et al. 2021; Jakobi 2009). Joachim et al. (2008) note, for example, that IOs can expose states that do not comply with norms and rules to the scrutiny of other actors through public "naming and shaming." In some cases, it may turn into different kinds of sanctions for states that do not comply with standards. The IAEA inspections of nuclear installations are an example of coordinative functions. Depending on the result of the investigations, the Agency can report it to other institutions, such as the United Nations Security Council, to take the appropriate measures. Joachim et al. (2008) provide another example, noting that the European Union monitors its members' implementation of monetary policies and can impose penalties for those that fail to comply with some of its standards. Corruption rankings can also help assess states' compliance with measures to improve the quality of their governments (Bauhr and Nasiritousi 2012).

Discursive dissemination, standard-setting, and coordinative functions are key mechanisms through which IOs can diffuse policies. It is also possible to perceive some increasing levels of institutionalization between them. The first mechanism consists of sharing ideas among members. In the second, these ideas became so well-accepted that they became patterns to be implemented by IO members. In the case of the third, these standards became so important that the IO needs to monitor their implementation and, eventually, propose sanctions for those who do not comply.

IOs can also support states in implementing some policies, making it easier to diffuse their ideas and standards through two mechanisms: *financial means* and *technical assistance* (Carvalho et al. 2021). The former means loans or donations to improve a state's financial capacity to implement a policy. An example was the diffusion of liberal economic policies by the International Monetary Fund during the 1980s and 1990s to Latin American countries. Loans were granted on the condition these countries applied orthodox economic policies, such as floating exchange rates and inflation control. On the other hand, technical assistance consists of supporting state representatives with the expertise of IO bureaucrats through courses, workshops, and policy missions. The IAEA, for example, provides training to states regarding radioactive detection.

The five previously mentioned mechanisms look at how IOs can act in an institutionalized way. However, Carvalho et al. (2021) highlight another way they can act. Pouliot and Thérien

(2017) and Stone et al. (2019) note that IOs enable the exchange of experiences between state representatives through informal interactions. Abbott and Snidal (2010) have an even broader look at such mechanisms, considering IOs' capacities to orchestrate interactions and the construction of governance rules, including states, corporations, and non-state actors. By calling this mechanism "orchestration" or "opening opportunities for dialogue," it is crucial to include it in a theoretical framework that aims to understand IOs' roles in policy diffusion processes. Pereira et al. (2018) provide an example of such mechanism. According to the authors, exchanges of information, courses, and workshops allowed representatives from Mercosur members to learn about successful experiences regarding migratory policies. Some of them decided to replicate good practices in their countries without any standard being elaborated by Mercosur. Hence, when IOs open opportunities for dialogue, we can see policy diffusion *within* them.

In this article, I investigate whether the South American Defense Council was able to act through each of the aforementioned mechanisms. Each of them becomes a hypothesis to be tested in an attempt to find evidence for the use, or lack thereof, of each mechanism. The hypotheses and required evidence for their corroboration are summarized in Box 1 below.

### Box 1 – Hypotheses: instruments to diffuse policies and required evidence

#	Mechanism/ Hypothesis	Definition	Required evidence
1	Discursive dissemination	Spreading ideas and discourses	Speeches and reports from the IO's bureaucracy, which were well accepted by state representatives and became policies
2	Standard-Setting	Elaboration of norms to be adopted by member states	Rules proposed by the IO bureaucracy that became implemented by its members states' agreement towards the need to implement certain measures, leading to their implementation
3	Coordinative Functions	Supervising the adoption of established standards by member states and inducing members to comply with such standards	Monitoring the implementation of decisions, naming, shaming, and, eventually, sanctioning those who do not comply
4	Technical assistance	Enhancing states' technical capacities to adopt a policy	A policy implemented after an IO sent bureaucrats to teach state representatives how to implement a policy
5	Financial means	Enhancing states' financial capacities to adopt some policy	A policy implemented after an IO lent or donated money for a state to implement it
6	Orchestration/Opening opportunities for dialogue	Facilitating the exchange of information and experiences between representatives from member states	Meetings, workshops, and courses that led to the implementation of some policy

Source: own elaboration

## Empirical Strategy

As seen in Thérien and Pouliot (2019), deconstructing the making of a policy is a useful strategy to show the mechanisms used to spread it. Hence, I test the hypotheses presented in Box 1 by using a deductive hypothesis-testing process tracing, a well-suited technique to deconstruct and investigate processes (Beach and Pedersen 2013), previously used to understand the SADC's creation (Teixeira Júnior and Silva 2017). It consists of tracing each step connecting an independent variable (SADC action) to a dependent variable (policy diffusion) in order to assess the mechanisms involved in such a process.

The first part of my analysis relies on the existing literature and SADC documents to discuss bureaucratic aspects of the council's actions. This is important because it allows for identifying the council's possibilities to act before actually testing the hypotheses. Then, I proceed to the empirical analysis.

Most evidence used in the process-tracing stage was retrieved from primary sources. By conducting digital archival research, I analyzed all 106 SADC documents available on the former UNASUR website to trace the procedures used by the council to advance its initiatives. It includes meeting records, declarations, and information about the accomplishment of SADC's actions. I identified 18 of these 106 documents that provided evidence for the case studies in the next section, mentioning each step of their developments. Additional evidence was also retrieved from the existing literature.

Finally, I follow Kapiszewski and Karcher's (2021) steps in order to enhance the replicability of such a qualitative analysis by including the ATI framework. It consists in increasing transparency in qualitative research by providing readers with access to the evidence used in each specific step of empirical analysis. I comply with such framework by clearly identifying sources from findings from SADC meeting records. Then, I also made the documents mentioned in the analysis (18 out of 106) publicly available<sup>2</sup>, providing readers access to the same evidence. This was done so that they can validate the findings. Pieces of evidence used in this paper are duly highlighted in these documents so that readers can easily see what was used in this analysis. By doing that, I intend to (1) contribute to the debate on qualitative methods, as well as (2) promote debates on regional defense cooperation by introducing more documentation on how it took place so that scholars can use it in future research.

## The South American Defense Council as a Policy Diffusor

Before using process-tracing, it is important to understand how the council could act in such processes. Inaugurated in 2009, the South American Defense Council emerged amidst the "Post-

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<sup>2</sup> Documents are available at Harvard Dataverse in the following link: <https://dataverse.harvard.edu/dataset.xhtml?persistentId=doi:10.7910/DVN/8LXKFN>

Hegemonic Regionalism” in Latin America when left-wing leaders tried to push regional integration beyond trade and economic issues (Abdul-Hak 2013; Riggirozzi and Tussie 2012; Sanahuja 2012). It was the first South American institution to multilaterally debate security and defense issues without the direct influence of Washington, contrary to existing institutions such as the Inter-American Defense Board and the Organization of the American States.

The council’s design was subject to a huge debate in the region. Former Venezuelan president, Hugo Chávez, wanted to implement a military alliance between South American nations similar to the North Atlantic Treaty Organization (NATO) to contain US influence. In Colombia, Álvaro Uribe wanted no mechanism at all, considering his partnership with Washington. Under Brazilian leadership, a pragmatic position prevailed, and the SADC became the least common denominator from leaders’ intentions. It became an institution aimed at respecting the autonomy and sovereignty of its members while increasing the exchange of information, building mutual trust, and supporting peace in the region (Abdul-Hak 2013; Mijares 2018; Teixeira Júnior and Silva 2017; Villa and Viana 2010).

The SADC was created to build a South American identity on defense issues, generate consensus about these matters, and make the region more peaceful. Most of its specific objectives were based on exchanging information in several areas, such as demining, natural disasters, peace operations, defense industry, among others. Its decisions should be made by consensus, respecting the sovereignty of all its members, and were not binding (Union of South American Nations 2018). This, of course, affected its capacity to set and coordinate the adoption of such standards. They would only be set if all member states agreed, while the council could have problems coordinating its members’ policies due to its non-binding character.

As the lowest common denominator of its members’ intentions, the council had problems establishing a permanent technical bureaucracy. Until 2013, there was only the *pro tempore* presidency, represented by the country that also exercised the *pro tempore* presidency of UNASUR. It was responsible for organizing and presiding meetings and representing the institution in external meetings. The lack of a bureaucratic body represented another problem for the SADC in acting as a policy diffuser, as it lacked the technical authority (Zürn et al. 2012) it needed to suggest policies to its members. As Vitelli (2017) notes, the main instrument the council had to influence policy-making processes was to support the interaction of policy-makers from its members by creating working groups and conducting seminars to debate policies and initiatives.

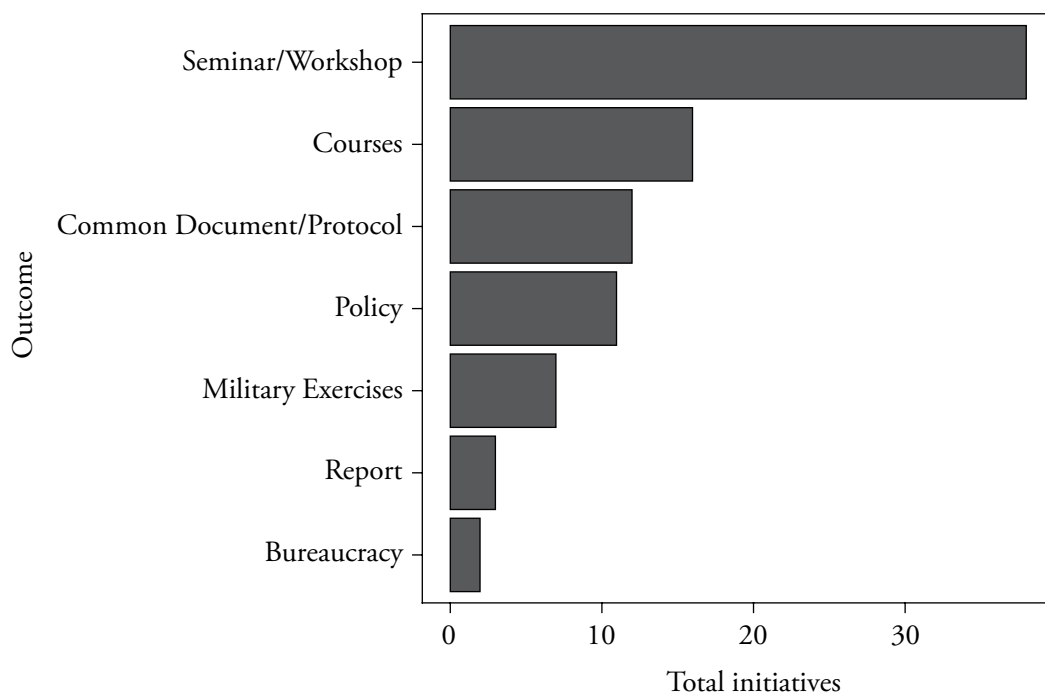
In 2011, the SADC created its first technical instance – the Center for Strategic Defense Studies (*Centro de Estudos Estratégicos de Defesa – CEED*) – aimed at supporting the construction and diffusion of knowledge on defense policies through South American nations, as well as to provide advice to its members (Briceño-Ruiz and Ribeiro Hoffmann 2015; Saint-Pierre and Palacios Junior 2014; Union of South American Nations 2010). Its technical personnel was then able to support the implementation of particular standards eventually set by SADC members. In 2014, the council inaugurated the South American Defense School (ESUDE) to promote regional

initiatives on defense education. Both ESUDE and CEED included permanent representatives indicated by SADC members.

Building on this institutional architecture, the SADC worked towards its objectives. The council successfully implemented 89 of 128 (69.5%) initiatives discussed during its nearly eight years of activities (Carvalho 2021b). It shows that the need for consensus was overcome several times, and, despite the absence of a bureaucratic body for most of the time, working groups delivered what they were supposed to.

Figure 1 provides a picture of the outcomes shaped by such initiatives. Most of them consisted of seminars, workshops, military exercises, and courses. It denotes an attempt to act as an orchestrator, building opportunities for state representatives to meet and interact. At the same time, three reports were released, meaning that the body tried to act through discursive dissemination. Finally, it is possible to see that the SADC set some standards, such as common protocols and policies, to be followed by its members. Tracing the implementation of such standards allows for understanding whether and how they were set, implemented, and coordinated. Over the following sections, I explore whether these attempts were successful and whether the SADC could actually diffuse defense policies over its members.

**Figure 1 – Outcomes of initiatives implemented by the SADC**



Source: own elaboration, based on Carvalho (2011b)

## Testing Mechanism 1: Discursive Dissemination

Evidence to test the discursive dissemination hypothesis should be based on speeches, reports, and actions from SADC bureaucrats taking into account the interest of member states, which consequently implemented recommended practices. However, its first bureaucratic structure, the Center for Strategic Defense Studies, only emerged in 2011. During its five years of activity, the CEED successfully delivered three initiatives: it (1) organized a seminar about national defense and natural resources, (2) shared a report on defense institutionalization in South America in July 2015, and (3) released the first part of a prospective study called “*Suramérica 2025*” in November 2016 (Carvalho 2021b). However, the available evidence does not show any policy implemented due to these initiatives. As a result, although the council tried to use its bureaucracies to diffuse policies, there is no evidence to say that it succeeded.

## Testing Mechanism 2: Standard-Setting

The standard-setting hypothesis can be corroborated in case there is evidence that SADC members agreed towards institutionalizing practices to be implemented by each other – and effectively implemented them. According to data from Carvalho (2021b), SADC members agreed on around 20 standards, including SADC procedural issues (such as creating its statute and emails @unasurcds.org), elaborating maps on dangerous zones regarding natural disasters, and confidence-building measures. In this section, I focus on tracing the implementation of a set of confidence-building measures to provide evidence for the standard-setting hypothesis.

In August 2009, South American heads of state and government joined an UNASUR emergency meeting. The topic was a military agreement between Colombia and the United States, which included establishing an American military base and sending military personnel to the country. Leaders then agreed on a declaration which, among other points, instructed defense ministers and ministers of foreign affairs to discuss measures to boost confidence building. Although some initiatives already existed amidst the Organization of American States, they agreed to develop new measures within the SADC<sup>3</sup>.

Ministers of Defense and Foreign Affairs met on September 15 and November 27 (2009) and discussed the implementation of a set of confidence-building measures. It included, for example, the exchange of information on military personnel, equipment, and expenditure; the need for members to notify the council in case they signed defense cooperation agreements with other partners; and the need to report military exercises made with other countries. They then delegated to SADC the responsibility to properly discuss these measures, deciding how they should be implemented<sup>4</sup>.

<sup>3</sup> Acta de la Reunión Extraordinaria de Jefas y Jefes de Estado y Gobierno de la UNASUR. 28 Aug. 2009. <https://dataverse.harvard.edu/file.xhtml?fileId=7452304&version=1.4>

<sup>4</sup> Reunión Extraordinaria de Ministros de Relaciones Exteriores y Defensa de la UNASUR. 27 Nov. 2009. <https://dataverse.harvard.edu/file.xhtml?fileId=7452300&version=1.4>

In January 2010, experts from UNASUR member states met to discuss the proposal. After elaborating a first draft, they sent it to the deputy defense ministers of SADC member states, who agreed to implement most measures – and kept analyzing those with which they disagreed<sup>5</sup>. These measures became standards in the same year, with the approval by Defense Ministers (May)<sup>6</sup> and Ministers of Foreign Affairs (November)<sup>7</sup>. From that point on, states should share information on (1) the organization and procedures of their Ministries of Defense; (2) military personnel and equipment; (3) weapons acquisition; (4) defense cooperation agreements signed with other countries; (5) defense expenditure; and (6) tracking weapons. SADC member states could also ask for other information about each other's defense policies<sup>8</sup>.

Other initiatives were also included in this set of confidence-building measures. SADC member states should notify other members in case of (7) military exercises in border regions while also improving communication with the armed forces in neighboring states; and (8) military exercises with other countries, as well as invitation to observers from other SADC member states to watch. Finally, they should allow other members to visit their military facilities<sup>9</sup>.

Evidence shows that most members followed these standards – at least those related to shared information. By the end of April 2011, Argentina, Brazil, Ecuador, Paraguay, Peru, and Venezuela had already reported the required information, and Colombia was about to do so<sup>10</sup>. There is thus evidence to corroborate the hypothesis that the SADC diffused a policy through a standard-setting mechanism: sharing information on national defense policies.

### Testing Mechanism 3: Coordinative Functions

Testing the coordinative functions hypothesis requires finding evidence that, after the council set a standard, it was able to monitor compliance with such norms by collecting and checking evidence, conducting inspections, and preparing reports, among other means. Complementary evidence can also show that it used instruments, such as “naming and shaming,” to create constraints on actors who did not comply with established standards. The case of the “South American Register on Defense Expenditure” provides the required evidence to corroborate this hypothesis.

<sup>5</sup> Acta – II Reunión de la Instancia Ejecutiva del Consejo de Defensa Suramericano. 28-29 jan. 2010. <https://dataverse.harvard.edu/file.xhtml?fileId=7452302&version=1.4>

<sup>6</sup> Declaración de Guayaquil. 6-7 May 2010. <https://dataverse.harvard.edu/file.xhtml?fileId=7452290&version=1.4>

<sup>7</sup> Resolución para los procedimientos de aplicación para las medidas de fomento de la confianza y seguridad. 25 Nov. 2010. <https://dataverse.harvard.edu/file.xhtml?fileId=7452288&version=1.4>

<sup>8</sup> Acta de la I Reunión Extraordinaria de la Instancia Ejecutiva del Consejo de Defensa Suramericano. 5 May 2010. <https://dataverse.harvard.edu/file.xhtml?fileId=7452301&version=1.4>

<sup>9</sup> Acta de la I Reunión Extraordinaria de la Instancia Ejecutiva del Consejo de Defensa Suramericano. 5 May 2010. <https://dataverse.harvard.edu/file.xhtml?fileId=7452301&version=1.4>

<sup>10</sup> Acta – IV Reunión de la Instancia Ejecutiva del Consejo de Defensa Suramericano. 29 Apr. 2011. <https://dataverse.harvard.edu/file.xhtml?fileId=7452303&version=1.4>

During the first meeting of the SADC Executive Instance – that is to say, the deputy Ministers of Defense of SADC members – in January 2009, there was a proposal “to increase the transparency of information about defense expenditure and economic indicators.” Such proposal was included in the 2009-2010 Action Plan<sup>11</sup>, which meant the Council intended to advance its development. Under the Argentinean and Chilean leadership, a working group was established to discuss a broader and long-standing mechanism for reporting such expenditures.

Such an agenda was catalyzed later in the same year, as the aforementioned military agreement between Colombia and the US boosted the debate on implementing confidence-building measures<sup>12</sup>. Reporting information about defense expenditures was included in that set of measures<sup>13</sup>. As a result, from August 2010 to June 2011, all SADC members were invited for meetings from the working group to debate a methodology to increase the transparency in defense expenditure, which met four times.

In August 2010, representatives from Argentina, Chile, Ecuador, Peru, and Venezuela met in Buenos Aires and elaborated a first draft of the methodology, together with a conceptual framework<sup>14</sup>. In November 2010, representatives from Brazil, Colombia, and Uruguay joined the team<sup>15</sup> in a second meeting, when they agreed to make the concepts behind the methodology more precise and report yearly data for defense expenditure, both in local currency and in dollars<sup>16</sup>. In June 2011, joined by Bolivia and Paraguay, the working group set deadlines for states to share the required information and decided to delegate to the CEED the responsibility of monitoring the implementation of the standard methodology. Finally, in July 2011, with the exception of Guyana and Suriname, which did not attend the meeting, representatives from all SADC members unanimously decided to send the final report on the standard methodology for the Defense Ministers to approve<sup>17</sup>. In November 2011, Defense Ministers approved the initiative<sup>18</sup>.

The council thus set a new standard. Its members should annually report their defense expenditures according to a standard methodology. They should report sums spent with personnel,

<sup>11</sup> Acta de la Reunión – Primera Reunión de Viceministros de Defensa del Consejo de Defensa Suramericano de UNASUR. 28-29 Jan. 2009. <https://dataverse.harvard.edu/file.xhtml?fileId=7452289&version=1.4>

<sup>12</sup> Acta de la Reunión Extraordinaria de Jefas y Jefes de Estado y Gobierno de la UNASUR. 28 Aug. 2009. <https://dataverse.harvard.edu/file.xhtml?fileId=7452304&version=1.4>

<sup>13</sup> Acta – II Reunión de la Instancia Ejecutiva del Consejo de Defensa Suramericano. 28-29 Jan. 2010. <https://dataverse.harvard.edu/file.xhtml?fileId=7452302&version=1.4>

<sup>14</sup> Acta – Taller “Metodología de Medición de Gastos de Defensa”. 27 Aug. 2010. <https://dataverse.harvard.edu/file.xhtml?fileId=7452297&version=1.4>

<sup>15</sup> The Venezuelan representative did not attend this second meeting. <https://dataverse.harvard.edu/file.xhtml?fileId=7452296&version=1.4>

<sup>16</sup> Segundo Taller Respecto de la Metodología de Medición del Gasto Militar. 05 May 2010. <https://dataverse.harvard.edu/file.xhtml?fileId=7452296&version=1.4>

<sup>17</sup> Acta – IV Taller sobre Metodología de Medición de Gastos de Defensa de UNASUR. 29 July 2011. <https://dataverse.harvard.edu/file.xhtml?fileId=7452298&version=1.4>

<sup>18</sup> I Reunión Extraordinaria de Consejo de Defensa Suramericano – II Declaración de Lima. 10-11 Nov. 2011. <https://dataverse.harvard.edu/file.xhtml?fileId=7452293&version=1.4>

consumer goods, services, equipment procurement and development, infrastructure, and research and development. Data should be reported in local currencies, dollars, and as a proportion of the GDP, for all Ministries of Defense and each of the armed forces (army, air force, and navy). A reporting form was previously established to make sure of its uniform interpretation. Data should be remitted to the then recently created CEED, which had the technical capacity to monitor the implementation of the so-called South American Register on Defense Expenditure<sup>19</sup>.

From November 2011 to May 2012, the CEED reviewed the methodology, received, validated, and systematized information on defense expenditure from each SADC member in an attempt to ensure a uniform application of the previously established standards. In June 2012, CEED reported it accomplished all these tasks and shared the first report containing information for defense expenditure in South America – the “*Informe del Registro Sul-Americano de Gasto de Defensa*” – including data from 2006 to 2010 with South American defense ministers<sup>20</sup>. The report would only be published in February 2014<sup>21</sup>. Still, the fact that defense ministers had access to each other’s defense expenditure provides evidence that (1) the standard methodology for reporting defense expenditure was a policy successfully diffused by the SADC and that (2) the council, together with its bureaucratic instance – CEED – reinforced the diffusion of such policy through coordinative functions.

The Center was also in charge of following up the initiative by elaborating a new document with South American defense expenditures from 2011 to 2013. In December 2014, CEED directors noted that 9 out of 12 members had already sent their data to the CEED. They pointed out that only Bolivia, Venezuela, and Guyana were pending to send their expenditure<sup>22</sup>. This means that more than receiving, validating, and systematizing information about this policy, the CEED also acted by naming and shaming those who still needed to comply. These coordinative functions remained until SADC activities ceased. Two more reports would be elaborated until the end of 2016: one including data on defense expenditure of South American countries from 2011 to 2013<sup>23</sup>, and another containing data from 2006 to 2015<sup>24</sup>.

<sup>19</sup> Acta – IV Taller sobre Metodología de Medicion de Gastos de Defensa de UNASUR. 29 July 2011. <https://dataverse.harvard.edu/file.xhtml?fileId=7452298&version=1.4>

<sup>20</sup> Acta – VI Reunión de la Instancia Ejecutiva del Consejo de Defensa Suramericano. 04 Jun. 2012. <https://dataverse.harvard.edu/file.xhtml?fileId=7452295&version=1.4>

<sup>21</sup> V Reunión Ordinaria del Consejo de Defensa Sueramericano – I Declaración de Paramaribo. 20 Feb. 2014. <https://dataverse.harvard.edu/file.xhtml?fileId=7452294&version=1.4>

<sup>22</sup> VI Informe del Director de CEED a la IV Reunión del Consejo Directivo. 11 Dec. 2014. <https://dataverse.harvard.edu/file.xhtml?fileId=7452292&version=1.4>

<sup>23</sup> I Reunión Extraordinaria del Consejo Directivo del Centro de Estudios Estratégicos de Defensa del Consejo de Defensa Suramericano – UNASUR. 14 July 2015. <https://dataverse.harvard.edu/file.xhtml?fileId=7452287&version=1.4>

<sup>24</sup> Acta – VII Reunión Ordinaria del Consejo Directivo del Centro de Estudios Estratégicos de Defensa del Consejo de Defensa Suramericano – UNASUR. 23 Nov. 2016. <https://dataverse.harvard.edu/file.xhtml?fileId=7452299&version=1.4>

## Testing Mechanism 4: Technical Assistance

Evidence to confirm such a hypothesis should indicate meetings between SADC's technical staff and its members. However, such evidence could not be found. As mentioned regarding SADC bureaucratic instances while testing the discursive dissemination hypothesis, the CEED acted through reports, and ESUDE through courses. No evidence was found about meetings between SADC members and CEED and ESUDE bureaucracies to teach the implementation of any particular practice. Therefore, no evidence exists that the SADC could diffuse policies through the technical assistance mechanism. There is no evidence even to say it attempted to act through this mechanism.

## Testing Mechanism 5: Financial Means

Any evidence for this hypothesis should be based on the SADC providing money for a country to invest in implementing certain policies. However, the council only had the financial conditions necessary for its own subsistence. There were no resources to fund the implementation of particular practices. As Carvalho (2021a) notes, the SADC's initiatives were implemented through working groups, with each member funding its own participation. Therefore, no evidence was found that the council provided financial means for states to implement policies.

## Testing Mechanism 6: Orchestration/Opening Spaces for Dialogue

Testing whether orchestration or opening spaces for dialogue was an instrument to diffuse policies within the SADC needs evidence that representatives from at least two members attended similar events (e.g., seminars and workshops) in which one of them shared information about a policy and the other got interested. Then, there should also be evidence that this interest generated the adoption of specific practices by the other state – as done by Pereira et al. (2018).

The SADC undoubtedly created opportunities for state representatives to interact with each other. Its activities comprised more than 40 courses, meetings, workshops, and seminars. These events were at the core of the council's actions in an attempt to build convergences between its members' security thinking. They covered different topics, such as sharing information about Ministries of Defense, incorporating gender perspectives into the South American armed forces, debating peace operations, and discussing shared views on international security (Vitelli 2017).

Assessing whether these interactions succeeded in producing policy diffusion is hard, as this kind of evidence is usually not available in meeting records due to the informal process in which it occurs. Still, in this section, I explore how Brazil used the council to diffuse the “*Sistema de Proteção da Amazônia*” (SIPAM), a system aimed at collecting, processing, and diffusing information about the Amazon.

In November 2012, during a meeting of the SADC Executive Instance, Brazil introduced the possibility of sharing SIPAM data and creating a regional system to monitor the region<sup>25</sup>. A seminar took place in August 2013, when the Brazilian representatives granted more information about the System to their peers from other South American countries. As the Surinamese delegation got interested in learning more about the Brazilian program, bilateral dialogues followed the seminar. Then, in September 2014, Brazil invited Surinamese authorities to a workshop to explain more details about SIPAM, where they received training regarding the Brazilian system (Centro Gestor e Operacional do Sistema de Proteção da Amazônia 2014). Brazil diffused a practice by providing them with skills to use the platform to monitor occurrences in the Amazon rainforest, such as environmental data, illicit trafficking, and meteorological information.

In this case, we can perceive that the SADC allowed Brazil and Suriname to exchange ideas about protecting the Amazon. From this opportunity, bilateral dialogues emerged, as the latter wanted to learn practices from the former in order to improve its governance regarding Amazon. It led to a process in which Brazil taught Surinamese authorities how to assess such information. But this was possible because the SADC enabled the beginning of such dialogue.

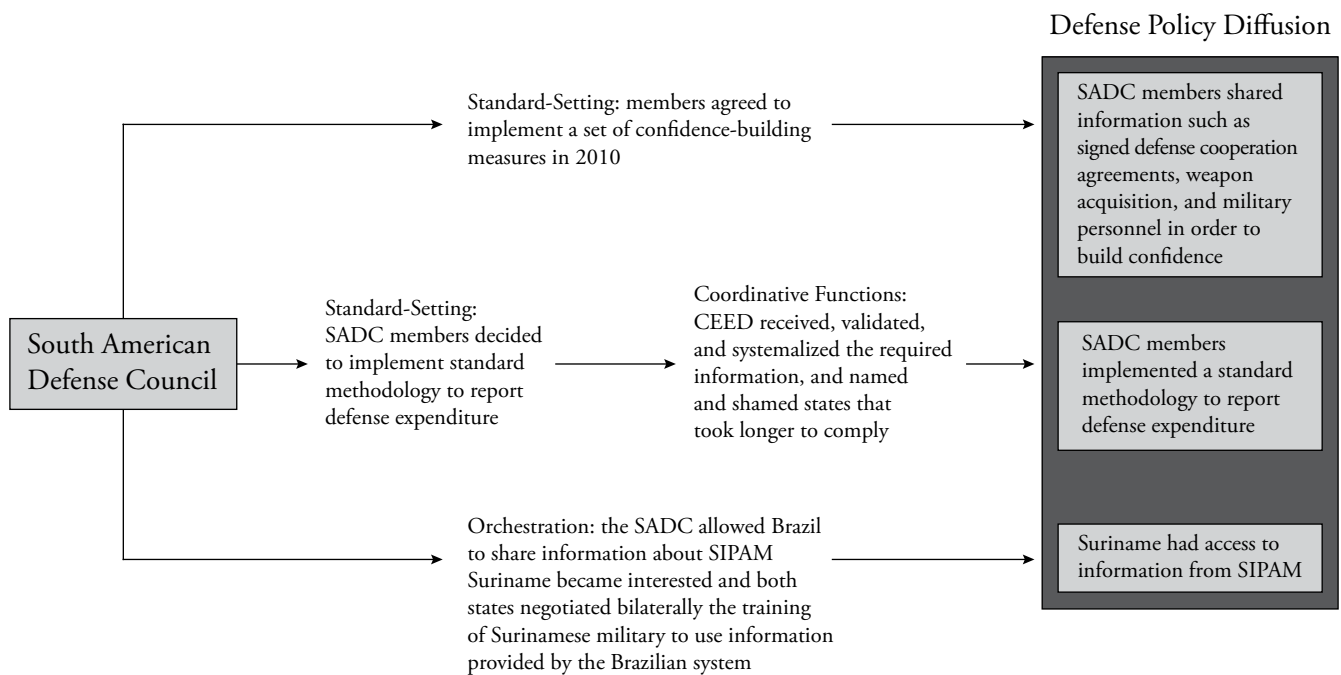
## Conclusion

This article showed that, despite its brief existence, the SADC diffused defense and security policies to its members. Evidence shows that such dissemination took place through three mechanisms. First, there were standards established within the council that were to be followed by its members, such as the set of confidence-building measures implemented after the signing of the US-Colombia security agreement. Second, it coordinated the implementation of such standards, as in the case of the CEED monitoring SADC member states sharing data on their defense expenditures. Finally, the council opened spaces for state representatives to interact, which indirectly resulted in policy diffusion, as we saw in the case of SIPAM. Figure 2 below summarizes the findings and pieces of evidence.

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<sup>25</sup> Acta – VII Reunión Ordinaria de la Instancia Ejecutiva del Consejo de Defensa Suramericano. 27 Nov. 2012. <https://dataverse.harvard.edu/file.xhtml?fileId=7452291&version=1.4>

**Figure 2 – Summary of Findings**



Source: own elaboration

This article contributed to the literature on South American security and defense issues. First, there was a methodological contribution. While keeping the tradition of using qualitative methods to explore the topic (Tickner and Herz 2012), it provides a framework for improving the transparency of its findings. More than moving towards increasing replicability in qualitative research, it intends to help advance debates on the topic by making evidence public in a way that readers can also investigate, as well as search for new information.

Still, this paper’s main contribution is the implications of its findings on the debate on defense cooperation in South America. By applying policy diffusion lenses, this analysis showed that multilateral defense cooperation could happen and influence member states’ policies, despite sovereigntist claims – such as the need for consensus within the SADC. The council allowed for the elaboration of shared standards to be implemented by its members and monitored such implementation. Despite its non-binding role, all members complied with such action, which allowed for increased confidence between them. As a result, although South American states are hardly willing to adhere to supranational integration – as it happens in other regions worldwide – multilateral cooperation can still help build confidence among them and increase security policy similarities. States can use these platforms to build cooperative ties and share information, building a peaceful exit from the security dilemma between them.

Findings also show that the socialization of defense policy-makers can disseminate policies in the region. It is important because, more than being a resource to build shared interests and identities among states (Adler and Barnett 1998; Vitelli 2017), seminars, workshops, courses, and meetings can also effectively increase dialogues and the circulation of ideas and policies in a

region. Such a circulation can even help states reduce their dependence on external actors, like the US, as these defense cooperation can allow them to build a more peaceful environment and share the costs of training their armed forces and developing technologies (Kinne 2018). Circulating information can also build confidence ties between South American states.

Finally, it is important to recall that the SADC did not end because it was ineffective. It died because of political changes in the region that killed the entire institution in which it was involved. Therefore, lessons are useful for understanding that multilateral defense cooperation can produce tangible results in South America. At the same time, it can include sovereignty-based rules (such as consensus and a non-binding character), build confidence, and increase policy similarities by allowing for more intense information flows between its members and creating policies to be followed by them.

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