UNIVERZITA PALACKÉHO V OLOMOUCI

Přírodovědecká fakulta

Akademický rok: 2021/2022

ZADÁNÍ DIPLOMOVÉ PRÁCE

(projektu, uměleckého díla, uměleckého výkonu)

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Osobní číslo:	**R200645**
Studijní program:	**N0588A330003 Development Studies and Foresight**
Specializace:	**Development Studies and Foresight – specialization in Global Development Policy**
Téma práce:	**Development cooperation**
Zadávající katedra:	**Katedra rozvojových a environmentálních studií**

Zásady pro vypracování

This thesis aims to provide:

- An overview, analysis, and comparison of currently employed development cooperation effectiveness evaluation frameworks/aid coordination initiatives
- An assessment of factors that directly and indirectly contribute to effective development cooperation between traditional Northern aid providers and non-traditional Southern providers
- Suggestions to improve the cooperation between traditional Northern aid providers and non-traditional Southern providers

Rozsah pracovní zprávy:	**10 – 15 000 slov**
Rozsah grafických prací:	**dle potřeby**
Forma zpracování diplomové práce:	**tištěná**
Jazyk zpracování:	**Angličtina**

Seznam doporučené literatury:

Asatullaeva, Z., Aghdam, R.F.Z., Ahmad, N. & Tashpulatova, L. (2021). The impact of foreign aid on economic development: A systematicliterature review and content analysis of the top 50 most inﬂuential papers. J. Int. Dev. 33, p. 717–751.

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Datum zadání diplomové práce: **21. ledna 2022**
Termín odevzdání diplomové práce: **30. května 2022**

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vedoucí katedry

V Olomouci dne 20. ledna 2022

Palacký University Olomouc
University of Clermont Auvergne
University of Pavia

MASTER THESIS

Linh Hoang

Supervisor: Professor Marinella Leone, PhD

GLODEP 2022

Evaluating the effectiveness of North-South-South Cooperation for the delivery of the 2030 Agenda: conceptualization, frameworks, and opportunities for improvement

Acknowledgement

This paper would not have been possible without the in-depth knowledge and insights gained throughout the joint master's program GLODEP. The courses on overall development challenges and development cooperation issues, along with practical experience shared from the field by the program's professors and guest lecturers, had inspired this paper to further explore the approaches to improve the evaluation of development cooperation effectiveness. In parallel, the courses on fundamental research methodologies in which quantitative and qualitative analysis skills were effectively combined in development studies had greatly underlined the analytical method employed in this paper.

The author is particularly grateful to professor Marinella Leone – Assistant Professor of Economics at the University of Pavia – for her constant guidance and feedbacks throughout the construction of this paper. The author thankfully acknowledges the unwavering administrative support provided by the consortium universities and the Palacky University in Olomouc as the coordinating institution in particular for this paper to be delivered to its final stage. The author extends her sincere thanks to her colleagues in the program who had been active in exchanging academic and professional advices and support during the preparation of this paper.

Abstract

The paradigm shift from aid to development effectiveness aligns with the recent changes in the aid architecture in face of the emergence of new providers in the Global South. That, combined with a universal umbrella framework under the 2030 Agenda, has opened a space for the North-South-South Cooperation to complement and improve other development cooperation modalities. The lack of academic and institutional efforts to generate internationally agreed principles and framework to evaluate trilateral development cooperation has been underlined by political and technical limitations primarily from the donor/provider's side. This paper leverages on literature review and analysis to explore the potentials of trilateral development cooperation in utilizing its comparative advantages for strengthening development cooperation and improving development effectiveness. Through comparing different evaluation principles and frameworks in traditional bilateral development cooperation, this paper suggests an inclusive evaluation framework for measuring the effectiveness of trilateral development cooperation, and provides recommendations on the integration a set of characteristics representing both Northern and the Southern development partners and activities.

Key words: development effectiveness; evaluation frameworks; GPEDC; ODA; SDGs; trilateral cooperation

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List of abbreviations

ADELANTE	European Union – Latin America and the Caribbean Facility for Triangular Cooperation
AgCI	International Cooperation Agency of Chile
BRICS	Brazil, Russia, India, China, and South Africa
CBDRs	Common But Differentiated Responsibilities
CBPFs	Country-Based Pooled Funds
CGD	Center for Global Development
CPA	country programmable aid
CPIA	Country Policy and Institutional Assessment
CSOs	civil society organizations
DAC	Development Assistance Committee
GIZ	German development agency
GNI	gross national income
GPEDC	Global Partnership for Effective Development Co-operation
GPGs	Global Public Goods
GPI	Global Partnership Initiative
HLF	High Level Forums
IATI	International Aid Transparency Initiative
MDGs	Millennial Development Goals
MOPAN	Multilateral Organization Performance Assessment Network
NeST	Network of Southern Thinktanks
NGO	non-governmental organization
NSC	North-South Cooperation

NSSC	North-South-South Cooperation
ODA	Official Development Assistance
ODI	Overseas Development Institute
OECD	Organisation for Economic Co-operation and Development
PA	Principled Aid
PEFA	Public Expenditure and Financial Accountability
QuODA	Quality of Official Development Assistance Assessment
SDGs	Sustainable Development Goals
SDR	Sustainable Development Report
SMPD	Survey on Monitoring the Paris Declaration
SSC	South-South Cooperation
TDC	trilateral development cooperation
UN	United Nations
UN DCF	United Nations Development Cooperation Forum
UN HLPF	United Nations High-level Political Forum on Sustainable Development
UN OCHA	United Nations Office for the Coordination of Humanitarian Affairs
UNDP	United Nations Development Programme
UNECOSOC	United Nations Economic and Social Council
VNRs	Voluntary National Reviews
WP-EFF	Working Party on Aid Effectiveness

Introduction

The uneven progress across the Millennial Development Goals (MDGs) combined with the unfulfilled commitment of high-income countries to increasing aid for development have highlighted the tremendous aid gap needed for the Sustainable Development Goals (SDGs) in the past decades. As Official Development Assistance (ODA) will remain to be an important source of finance for development (World Bank Group, 2015), the attention among aid scholars and in the aid community begins to be diverted from increasing aid volume to improving the effectiveness of aid and subsequently development cooperation after a paradigm shift in the aid architecture. Against that backdrop, the 2030 Agenda – the most ambitious set of development objectives ever been set – with its creation of an inclusive multilateral umbrella for the delivery of the SDGs has enabled the rise of North-South-South Cooperation (NSSC) as a seemingly new modality for enhanced multistakeholder development cooperation.

Facing the same fate as development cooperation activities, the efforts of evaluating development effectiveness are highly fragmented due to various political and technical limitations as a result of the persistent North-South divide. While the traditional North-South Cooperation (NSC) modality led by the Organisation for Economic Cooperation and Development (OECD) that represents the world's largest donors enjoy rich literature on evaluation approaches and results with NSC activities systematically recorded and publicly accessible, the evaluation of South-South Cooperation (SSC) has been highly scattered and poorly documented with the absence of any mutually agreed standards or platforms to report and measure SSC activities. Consequently, it is of no surprise that the major challenge to proving the effectiveness of a modality that engages both Northern donors and Southern partners like NSSC has been the lack of a universally endorsed evaluation principles and framework.

Previous recent meta-analysis studies and systematic literature review such as Doucouliagos and Paldam (2009), Mekasha and Tarp (2019), and Asatullaeva et al. (2021) have been focused heavily on assessing and/or validating the impacts of foreign aid on development in the recipient countries rather than facilitating the articulation of a commonly agreed definition on trilateral development cooperation and evaluation framework for development cooperation activities that involve partners from both the North and the South. For example, the literature review conducted by Asatullaeva et al. (2021) on the fifty most influential literature surveys studies dated back to the 1990s does not go beyond the scope of content analysis of these papers towards producing any recommendations regarding political and technical aspects to enhancing the evaluation of development cooperation.

To explore the potentials of NSSC in improving development effectiveness, this paper will analyze how NSSC can leverage on the comparative advantages of development actors for strengthened development cooperation, and how development effectiveness can be measured in NSSC. This paper aims to fill in the gaps in the current academic and institutional efforts in building a stage for promoting and evaluating NSSC activities. Through discussing the strengths and limitations of designed evaluation principles and frameworks, this paper suggests a more inclusive evaluation framework that takes into account the characteristics of development partners and activities from both the North and the South.

Based on the literature review and analysis of the maturity of the concept and evaluation approaches of development cooperation and development effectiveness, this paper seeks to answer to the following research questions:

- What are the gaps in the delivery of the Sustainable Development Goals and current development cooperation that the North-South-South Cooperation modality can fill in?
- What are the strengths and weaknesses of the current development cooperation effectiveness evaluation principles and frameworks for North-South Cooperation, South-South Cooperation, and North-South-South Cooperation?
- How can the developed, piloted and/or applied evaluation principles and frameworks for North-South-South Cooperation be improved and enhanced?

Chapter 1 of this paper examines how the 2030 Agenda and its ambitious set of development objectives have shed the spotlights on the need to improve coordination among development actors for the delivery of a massive web of interconnected development goals, targets, and indicators. This chapter serves as the foundation to justify how NSSC can potentially fill in the gaps in development financing through enhancing the effectiveness of development cooperation. Chapter 2 briefly explains how the concept of development cooperation has evolved since its inception while positioning its transition in the context of changing aid architecture influenced by the emergence of new major actors in the Global South. Along with the evolving concept of development cooperation, this chapter provides an analytical and critical overview of the attempts by academia and aid agencies to measure the quality and effectiveness of aid spending and subsequently of development cooperation. Chapter 3 analyzes how the engagement of a Northern donor (Southern provider) in existing SSC (NSC) activities can yield greater benefits for all three stakeholders and other development actors involved in trilateral cooperation compared to bilateral partnership. The comparative advantages of NSSC considering the modality's close linkages with the implementation of the SDGs are also demonstrated. Key concerns of high transaction costs, pursuit of strategic interests, and undermined ownership facing NSSC are also discussed and addressed in this chapter. Most importantly, this chapter presents the methodology, strengths and weaknesses of three frequently monitored and updated evaluation frameworks that can be applied to evaluating NSSC, one of which is developed and conducted jointly by the OECD and the United Nations (UN), while the other two are designed by as an evaluation exercise independent from donors. Chapter 4 points out the most suitable evaluation framework that reflects the characteristics of NSSC and its involvement in the SDGs delivery, accompanied by recommendations on how to enhance the comprehensiveness, inclusiveness, and legitimacy of the selected evaluation framework.

The findings of this paper are primarily based on literature review and analysis to reflect the evolution of critical discussions and debates on development cooperation and development effectiveness. A combination of well-established evaluation frameworks and monitoring reports that are recently and frequently conducted by aid agencies and independent development institutes are consulted in the search for the most suitable evaluation framework for NSSC. As the focus of the study is on the aid to development effectiveness transition, recent publications, particularly papers published since 2011 are referred more often for in-depth analysis. Key sources of literature and information that underline the analysis and findings in this paper include:

- On the SDG framework and delivery: annual progress reports by UN agencies; (Vaggi, 2018); (Kharas, 2007a); (Kharas, 2007b); and (Southern Voice, 2020);
- On the evaluation of NSC: the OECD's publications, particularly on the evaluation frameworks and the monitoring results of the Paris Declaration; the Global Partnership for Effective Development Cooperation (GPEDC)'s publications; the Center for Global Development (CGD)'s evaluation frameworks; the Overseas Development Institute

(ODI)'s evaluation frameworks; and policy and working papers complied by the German Development Institute;

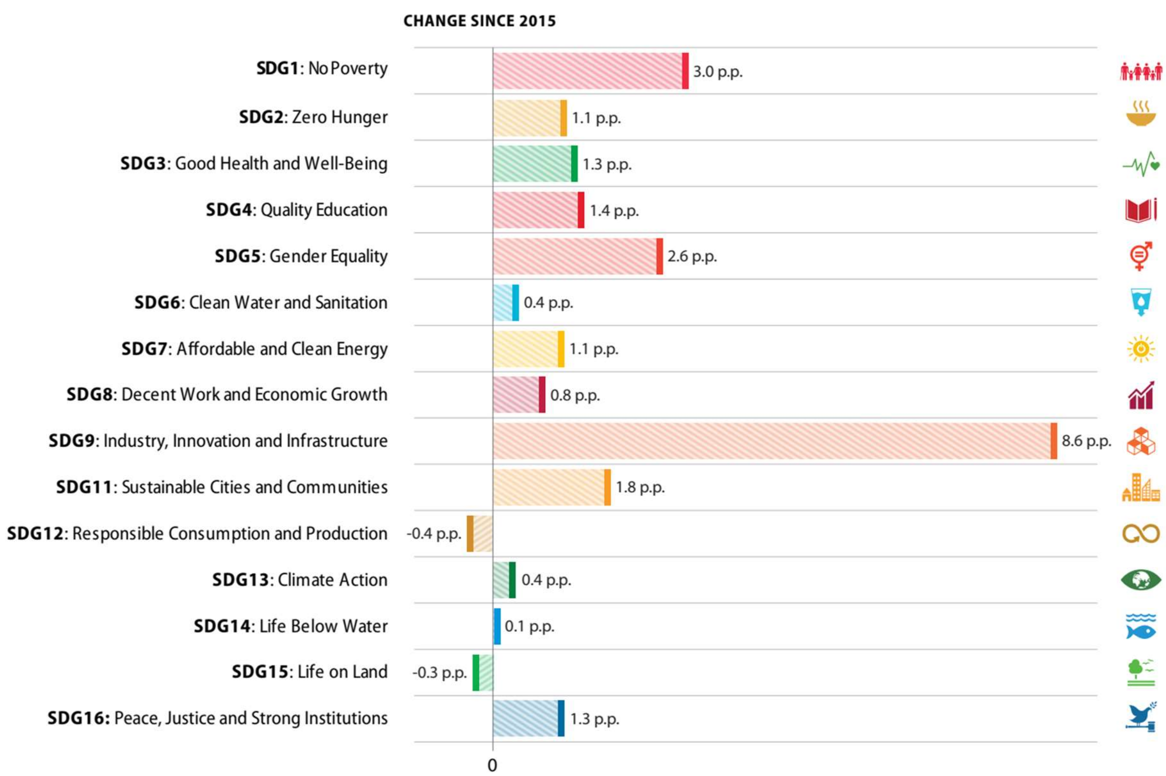
- On the evaluation of SSC: the Network of Southern Thinktanks (NeST)'s evaluation frameworks and case studies; (Besharati, 2013); and (Chaturvedi et al., 2021);
- On the evaluation of NSSC: (UNECOSOC, 2008a); (UNECOSOC, 2008b); the Global Partnership Initiative (GPI)'s evaluation principles; and (Besada et al., 2019).

Chapter 1. Development goals and the aid architecture

I. The ambitious Sustainable Development Goals

Ten years since its inception at the UN Conference on Sustainable Development Rio+20 in 2012, the 2030 Agenda has failed to accelerate global efforts needed to 'leave no one behind' embraced as the core in the five transformative shifts of the SDGs. In fact, only eight years to the SDGs' deadline in 2030, the world is still just one third way towards the set targets, and no country or region is on track of realizing the SDGs (Schmidt-Traub, 2015; Nhamo & Mjimba, 2020). Despite considerable progress on SDG 1 (No Poverty) and SDG 9 (Industry, Innovation and Infrastructure), most parts of the world experienced noticeably slow progress in the majority of the SDGS, while SDG 12 (Responsible Consumption and Production) and SDG 15 (Life on Land) witnessed reversal progress (Sachs et al., 2021).

Figure 1. SDG progress since 2015 in percentage points



Source: Sachs et al. (2021, p.19)

Moreover, there remain substantial disparities in SDGs progress within regions due to the increase in inequalities and the lack of sufficient efforts towards sustainability (Sinclair, 2013; Schmidt-Traub, 2015; Kumar et al., 2016; Sachs et al., 2020). The Sustainable Development Report (SDR) 2021 has pointed out that all eight regions, including the high-income country group such as the OECD, are faced with significant challenges across the SDGs (Sachs et al., 2021). The OECD group's poor performance on SDGs 12-15 also reflected its failed attempts in transforming the economy and supply chain into more environmentally sustainable (ibid.). The outbreak of a global pandemic – COVID-19 – has worsened the already slowed down race toward the 2030 Agenda since 2019 (ibid.). A global decline in the average SDG Index score was captured for the first time since the SDGs' official adoption in 2015 (ibid.).

To understand the setbacks in achieving the SDGs, it is only fair to acknowledge that these goals were conceived against the backdrop of the MDGs' unfinished agenda in terms of inclusiveness, equality, urbanization, and global partnership (Sinclair, 2013; Loewe, 2014; Kumar et al., 2016; United Nations, 2015). The absence of a framework to transform the MDGs into national objectives certainly added to the high disparities in MDGs achievement (Loewe, 2014). Uneven progress was observed in most indicators in which social and gender inequalities continued to majorly affect the poorest (United Nations, 2015). MDGs achievement was also undermined by worsening climate change and environmental degradation as a result of the inadequate representation of environmental aspects in its agenda (ibid.).

Certainly the expectation on the post-2015 agenda to fill in the MDG concept's shortcomings has been high. The SDGs in need are the most ambitious set of development objectives that has ever been established, looking straight at the multidimensional nature of development (Sinclair, 2013; Schmidt-Traub, 2015; World Bank Group, 2015; Vaggi, 2018; Southern Voice, 2020).

First, with a substantial number of 17 goals, 169 targets, and 232 indicators – a significant increase from 8 goals, 21 targets, and 63 indicators during the MDGs (Kumar et al., 2016), the SDGs accelerate ***a fundamental shift*** in the development paradigm from mere poverty reduction to more transformative, inclusive, and sustainable development (Hackenesch & Janus, 2013; Schmidt-Traub, 2015; World Bank Group, 2015; Mawdsley, 2018; Vaggi, 2018; Southern Voice, 2020; Sachs et al., 2021). Kharas and Rogerson (2017) critically analyze that the disjointed approach to development and sustainability during the MDGs was better addressed during the SDGs with greater concerns given to peace and institutions, jobs and equity, as well as climate change. Additionally, the entry of ***Prosperity*** as a new arena in the 2030 Agenda has acknowledged the importance of economic growth in ensuring inclusiveness and sustainability (Vaggi, 2018).

Figure 2. Old and new goals and the five Ps

MDGs	*Area*	*SDGs*
1–6	People	1–5
7	Planet	6, 7, 11, 13, 14, 15
	Prosperity	8, 9, 10, 12
	Peace, inclusive societies, justice	16
8	Partnership, global one	17

Source: Vaggi (2018, p.40)

Second, the dense web of SDG targets and indicators are placed within an ***interconnectedness***, meaning that certain goals are instrumental in realizing others (Vaggi, 2018; Nhamo & Mjimba, 2020; Southern Voice, 2020). Based on the analysis of the sustainable reproduction cycle considering key factors of development that are reflected in the SDGs' 5Ps dimensions (see Figure 2), Vaggi (2018) concludes that goals like SDG 6 (clean water), SDG 7 (energy), SDG 9 (infrastructures), SDG 11 (big cities), SDG 12 (sustainable consumption and production systems), and SDG 13 (climate action) are the means to achieve other goals but not end goals themselves. Lopes et al. (2020) demonstrate the trade-offs among SDGs as another dimension of their interconnectedness through pointing out the fact that ensuring universal access to energy in SDG 7 casts negative effects on climate actions in SDG 13.

Third, the ***universality*** of the SDGs and their five transformative shifts (leave no one behind; sustainability; jobs and inclusive growth; peace and institutions; and global partnership) (Vaggi, 2018) is certainly an improvement from the MDGs. One of the key factor in the MDGs' design underlining the difficulties of developing countries in transforming the goals into national objectives was that the MDGs were formulated by a small group of technical experts that positioned developing countries in the passive role of aid recipients in the MDG implementation

(Loewe, 2014; Kumar et al., 2016). That ultimately resulted in a series of consultations conducted by UN agencies with developing countries to capture their priorities and perspectives on the SDGs' thematic areas, including those not covered during the MDGs such as inequality, population dynamics, and growth and employment (Morton, 2013).

II. Where are the gaps for development cooperation to fill in?

Consequently, the achievement of the SDGs requires a huge financial assistance, a gap that was left unaddressed from the MDGs and highlighted during the 2030 Agenda (World Bank Group, 2015; Kumar et al., 2016; Southern Voice, 2020). Despite being an important resource for financing development, ODA flows into developing countries had been fluctuating throughout the adoption of the MDGs.

The 0.7% target of ODA contribution from gross national income (GNI) committed by rich countries since 1970 was far from being met during the MDGs (UNDP, 2003). At the 2002 International Conference on Financing for Development in Monterrey, the OECD's Development Assistance Committee (DAC) – a group of 23 largest donors at that time – pledged only 0.26% of their GNI a year in additional aid to fund the MDGs (ibid.). The fluctuation in aid disbursement occurred because the MDGs' financing model was heavily rooted in the concept of ODA and the outdated North-South aid paradigm defined since the 1970s, making it highly susceptible to economic downturns in donor countries (Besharati, 2013).

Against that backdrop, the SDGs' increased ambition and complexity are in stark contrast with the failing commitments from traditional donors. Under current trends, the 0.7% target is unreachable for most DAC members (Kumar et al., 2016; Mawdsley, 2018; Mawdsley, 2021). The total ODA contributed by DAC member countries reached 0.32% of GNI in 2020, less than halfway from the 0.7% target (OECD, 2020). The prospect of the SDGs financing's continual dependency on ODA from traditional donors seems gloomy as even if the 0.7% target is met by all DAC members, it will still be inadequate to provide the trillions dollars needed to achieve the goals (Mawdsley, 2018; Donnell, 2020; Mawdsley, 2021).

Another issue in financing the SDGs revolves around the question: how much aid is actually allocated to programs and projects serving long-term development purposes? Referring these projects and programs as country programmable aid (CPA), Kharas (2007b) points out that there are major transfers classified as aid but do not directly contribute to development, namely (i) administrative overheads, (ii) debt relief on non-concessional loans, and (iii) humanitarian assistance and food aid. When subtracting these special purpose flows from total aid, net CPA was showed to be significantly lower than net ODA (ibid.). In fact, among 105 billion US dollars of ODA in 2005, barely one-third (33 billion US dollars) went to development-oriented programs and projects in poor countries (ibid.).

Considering the MDGs' financing gaps and the 2030 Agenda's ambitions, this is no coincidence that SDG 17 on global partnership is often considered the most important goal leveraging the implementation of all other goals (Vaggi, 2018; Nhamo & Mjimba, 2020). In line with the MDGs, the 2030 Agenda's SDG 17 continues to affirm the central role of global networks and partnerships in enacting joint development processes with the clear identification of roles, responsibilities and resources of major stakeholders (UNDESA, 2015). The spotlight on SDG 17 reflects the demand for financial support for the 2030 Agenda, which particularly calls for traditional donors' commitment to the longstanding 0.7% target for ODA, and additional sources for financing development (ILO, 2015). From a broader perspective, the approval of the 2030 Agenda by UN member states equals their agreement on the creation of a mutually supportive international environment with sectors and actors joining hands to leverage and engage their own resources, capacities, and knowledge to respond to shared sustainable development challenges (Southern Voice, 2020).

Since the 1980s, the development landscape has been drastically transformed with the rising number and enhanced stance of non-DAC donors, particularly newly rich and middle-income countries in Asia (Burall et al., 2006; Kharas, 2007a; Bartenev & Glazunova, 2013). From four traditional donors in the 1940s (Bartenev & Glazunova, 2013), the total number of bilateral donors had reached nearly 60 by 2017 with 39 additional donors classified as emerging providers (Benn & Luijkx, 2017). Once poverty-stricken nations like China and India are establishing their own development programs and projects in the Global South worth of billions in development assistance each year (Kharas, 2007a; Besharati, 2013; Hackenesch & Janus, 2013). These development programs and projects by the South and for the South have formed the SSC in contrast to the traditional NSC in the OECD DAC's aid paradigm. The increasing flows from non-DAC bilaterals, though have positive impacts on the size and dynamic of development resources, add to the complexity of development cooperation (Kharas, 2007b). In parallel, such a change in the aid architecture poses a threat to the unadjusted ODA concept since the 1970s, as the concept restricts a great proportion of the assistance from new providers (Besharati, 2013; Kharas & Rogerson, 2017; Mawdsley, 2018).

In presence of actor proliferation, realizing the SDGs is determined by how successful these actors will be in accelerating different modalities of cooperation while finding constructive approaches to addressing shared responsibilities (Chaturvedi et al., 2021). One of the ways for development cooperation to transform itself to adapt to the 2030 Agenda is to create new forms of cooperation for the SDGs, among which the NSSC has been recognized for its potentials in filling the effectiveness gaps left by NSC and SSC (ibid.). Southern providers have been referred as anchor countries to provide complementary support and share the costs of development interventions in trilateral cooperation (Besharati, 2013). Underlying the NSSC movement is the shift among traditional donors "from doing development cooperation 'in' middle-income countries to doing it 'with' middle-income countries", as developed countries have increasingly sought emerging economies' support in addressing global challenges as well as in providing Global Public Goods (GPGs) (ibid., p.12).

The inclusive multilateral umbrella brought about by the SDG framework is an enabler for NSSC, allowing different development cooperation providers to contribute their respective strengths while accommodating all types of (Chaturvedi et al., 2021). However, a universal framework that captures the quality, results, and impacts of development cooperation is still missing, as the SDG framework offers no specific guidance on how different platforms and actors can coordinate their efforts towards fulfilling the goals in a holistic and integrated manner (Kharas & Rogerson, 2017). That calls for commonly agreed evaluation principles and framework to measure the effectiveness of development cooperation that contributes to the implementation of the 2030 Agenda (Southern Voice, 2020; Chaturvedi et al., 2021).

Chapter 2. The transition towards development effectiveness

I. Revisiting the formation of development actors: North vs. South

Emerging in the late 1940s following the US' Marshall Plan for European reconstruction after the Second World War, development cooperation gradually gained its importance in connecting foreign aid with development (Rosseel & Verniers, 2009). It was not until the 1960s that the OECD began to lead the idea of supporting developing countries through providing and adapting assistance to their requirements (Hynes & Scott, 2013).

Development cooperation is defined in general term as cooperation that serves the purpose of assisting a country in making socio-economic progress (Klingebiel, 2014). The OECD DAC have played a dominant role in shaping a framework for development cooperation that traditionally involved Northern donors providing aid to Southern recipients. There are three main criteria to classify international assistance as development cooperation: (i) assistance provided to a predetermined list of developing countries that is revised every three years; (ii) assistance contributed to economic growth or improved living standards; and (iii) assistance consisting of grants or concessional loans with grant element of at least 25% (ibid.).

In a policy brief prepared for the United Nations Development Cooperation Forum (UN DCF), Alonso and Glennie (2015) define development cooperation as an "activity that aims explicitly to support national or international development priorities, is not driven by profit, discriminates in favor of developing countries, and is based on cooperative relationships that seek to enhance developing country ownership" (p.4). UN DCF's definition is hence much broader than the OEDC DAC's, as it goes beyond direct resource transfers to encompass financial and in-kind transfers, capacity support, and development-oriented policy change at national and international levels (Alonso & Glennie, 2015). The close connection between the provision of GPGs and development cooperation is also discussed (ibid.).

Chaturvedi (2012) conceptualizes development cooperation into the three different yet not exhaustive areas of development finance (i.e. foreign aid and concessional finance provided by a country to support development in another country), policies with international impacts (i.e. policies affecting the exchange of capital, goods, people, and ideas for mutual benefits), and contribution to GPGs (i.e. efforts dedicated to global issues that are beneficial to all). While the first two areas relate to bilateral policies that affect other countries, the impacts of the third group are international, in which states can neither be excluded from GPGs or diminish them (ibid.).

Definitions are often politically sensitive in the context of development cooperation. There have been increasing political pressures to expand the definition of ODA to consider aid flows deemed more palatable to the Southern providers, particularly to cover foreign peacekeeping (Hynes & Scott, 2013; Klingebiel, 2014; Kharas & Rogerson, 2017). The vague definition has allowed traditional donors to pursue their political interests while asserting heavy constraints on recipient countries via conditionalities and tied aid. These types of impositions are fueled by an unequal donor-recipient partnership in NSC that stemmed from the North's historical responsibilities for rectifying colonial and post-colonial exploitation (Rosseel & Verniers, 2009; Mawdsley, 2012; Besharati, 2013; Klingebiel, 2014). Consequently, the donor-recipient tensions persist while foreign aid is failing to deliver results, as the national development concerns of the recipients are sometimes disregarded in favor of donors' political ends (Kharas, 2007b; Hoeffler & Outram, 2011; Agarwal, 2019). The negative consequences also extend to higher transaction costs for recipients of large amounts of aid, aid unpredictability from donor's side, and overall inefficient aid spending (Almasifard, 2019).

Originating from a parallel yet different historical narrative, the contemporary SSC conceptualized at the 1955 Bandung Conference is based on the principles of untied aid, mutual benefit, equality, and national ownership as a result of the increasing preference among developing countries in the South for mutual cooperation over dependence on Northern donors (Rosseel & Verniers, 2009; Warmerdam & Haan, 2019). Although SSC has existed for decades, emerging economies in the South like Brazil, Russia, India, China, and South Africa (BRICS) only took the role of non-DAC donors recently during the 2000s (Keijzer, 2012; Besharati, 2013; Hackenesch & Janus, 2013; Mello e Souza, 2021). Generally recognized as the leaders in the SSC model, these nations are deemed to emphasize on supporting national development priorities through the exchange of resources, technology, knowledge and experience (Roy & Andrade, 2010; Bartenev & Glazunova, 2013; Lauria & Fumagalli, 2019). Non-DAC donors also enjoy the advantage of sharing a similar historical background and physical geography with recipient countries, which makes the alignment of their national standards, interests and goals easier, and hence the implementation of SSC more cost-effective (Fernando, 2019).

Despite the endorsement of non-conditionality as a key partnership principle, SSC also suffer from the criticism of turning recipient countries into neo-colonialist territories – a state where a country "is, in theory, independent and has all the outward trappings of international sovereignty. In reality its economic system and thus political policy is directed from the outside" by donor countries in this case (Nkrumah, 1965, p.3). For example, the growth in both the volume and scale of China's assistance in African countries has been regarded as an attempt to enhance its soft power and gain political support in the region (Kragelund, 2008; Hackenesch & Janus, 2013), whereas it is reported that the country's assistance for construction project in Tanzania and Zambia permits natural resource exploitation and poor working conditions (Chen et al., 2018).

Development assistance is no longer the preserve of only high-income countries. In addition to the proliferation of donors as mentioned in the previous chapter, the volume of ODA provided, and the scale of development programs and projects conducted by new providers is on the rise. ODA from non-DAC donors in general and emerging economies in particular has grown steadily during the MDGs in the 2010s, and nearly tripled in 2019 compared to the 2010 figure[1]. China, India, South Korea, Brazil and Turkey, while remaining aid recipients, were estimated to contribute approximately 8 billion US dollars in development assistance in 2005, focusing on development projects and programs (Kharas, 2007b). However, it would be senseless to compare the currently miniscule SSC volume to DAC donors' assistance of over 100 billion US dollars a year[2]. Nevertheless, these fundamental ongoing changes in the aid architecture leave a space for new approaches and models of development cooperation going forward (Besharati, 2013; Hynes & Scott, 2013; Sinclair, 2013; Kharas & Rogerson, 2017; Chaturvedi et al., 2021).

II. A paradigm shift: From aid effectiveness to development effectiveness

The transformation of the aid architecture from the domination of donor-recipient relationship to the acknowledgement of new forms of development cooperation occurred in parallel with the transformation of the development evaluation paradigm shift from aid effectiveness to development effectiveness.

In the past decades, several attempts have been made to conceptualize the quality and effectiveness of aid and development cooperation, as well as the performance of donors. Mosley (1985)

[1] Data retrieved from OECD's Query Wizard for International Development Statistics as of February 18th 2022
[2] Data retrieved from OECD reports and trends as of February 18th 2022

pioneered in quantifying aid quality by analyzing several criteria for making aid decisions including selectivity, concessionality level, and conditionalities across recipient countries. Mosley (1985) also highlights an important observation that the aid process has become more of a social process, in which it is difficult for a single donor, especially a capitalist country, to employ independent aid policies. In the presence of a global foreign aid forum like the OECD DAC, donor performance now is measured in terms of both quantity and quality based on internationally agreed norms and standards, leading to substantial complementarities in the donor community.

To examine the impacts of aid on poverty reduction – the central object of foreign aid for decades, Collier and Dollar (2002) develop a methodology to estimate 'poverty-efficient' allocation. Using an extensive measure of policy across recipient countries, Collier and Dollar (2002) are able to confirm that the marginal efficiency of foreign aid in increasing income is determined by policy quality and aid volume received. Collier and Dollar (2002) warn that aid allocation in reality is inefficient with respect to its impacts on poverty reduction, as aid is partly allocated for inducing policy reforms and for other historical and strategic reasons.

Recognizing the interlinkages between aid quantity and quality, Roodman (2004) contributes to developing the Center for Global Development's Commitment to Development Index – an index reflecting the "quality-adjusted aid quantity" in dollars across aid donors and programs using the DAC database. On the quantity side of the index, a net transfer concept is built to ensure that the aid disbursements reflect actual transfers. On the quality side of the index, Roodman (2004) includes factors like penalty for tied aid; scoring system on poverty and governance selectivity; and penalty for project proliferation.

Easterly and Pfutze (2008) look into what makes an aid agency ideal through a review of the best practices and difficulties facing these agencies. Transparency and four other dimensions that constitute the best practices in foreign aid, namely fragmentation, selectivity, ineffective aid channels, and overhead costs, are characterized and measured. Facing the tremendous challenge in data collection as a result of limited transparency on aid spending, Easterly and Pfutze (2008) highlight the remarkably fragmented international aid efforts within and across aid agencies with little to no coordination among donors.

Built partly on Easterly and Pfutze (2008)'s work and current development evaluation practices, Knack et al. (2010) combine existing indicators with recently developed indicators by the OECD

DAC following the Paris Declaration on Aid Effectiveness in 2005 to construct an aid quality index. Knack et al. (2010) identify aid selectivity, aid alignment, harmonization, and specialization as the four dimensions in their aid quality study. Knack et al. (2010) emphasize that the interactions among donors are often overlooked in some of the indicators that attempted to rank donors, which is one of the key challenges to assessing aid quality.

Representing official aid agencies, the OECD DAC began to promote greater aid effectiveness after the Monterrey Conference in 2002 that called for donors' commitment to improving their practices (Almasifard, 2019). A series of High Level Forums (HLF) on Aid Effectiveness since 2003 led to the Paris Declaration on Aid Effectiveness in 2005 – together with the Accra Agenda for Action in 2008 – which became the new guideline for measuring aid effectiveness among DAC donors (Besharati, 2013).

The five principles of aid effectiveness along with twelve indicators and 2010 targets set in the Paris Declaration can be found in Table 1. The selected indicators assess country-level collective behaviors that can be regionally or globally aggregated, providing a benchmark for and allowing the comparison of donor and recipient performance across countries (OECD, 2008). In addition to global targets like the MDGs, the Paris Declaration created space for donors and partner countries to adopt country-level targets, though without a clear instruction of how. The 2005 baseline was proposed by the Working Party on Aid Effectiveness (WP-EFF) – an executive donor-only committee established by the OECD DAC in 2003 – which began to include representatives of recipient countries and other key stakeholders after the Paris Declaration (Besharati, 2013).

Table 1. The Paris monitoring principles and indicators

	OWNERSHIP	TARGET FOR 2010
1	*Partners have operational development strategies* – Number of countries with national development strategies (including PRSs) that have clear strategic priorities linked to a medium-term expenditure framework and reflected in annual budgets.	**At least 75% of partner countries** have operational development strategies.
	ALIGNMENT	**TARGET FOR 2010**
2	*Reliable country systems* – Number of partner countries that have procurement and public financial management systems that either (a) adhere to broadly accepted good practices or (b) have a reform programme in place to achieve these.	(a) **Public financial management** – Half of partner countries move up at least one measure (*i.e.*, 0.5 points) on the PFM/ CPIA (Country Policy and Institutional Assessment) scale of performance. (b) **Procurement** – One-third of partner countries move up at least one measure (*i.e.*, from D to C, C to B or B to A) on the four-point scale used to assess performance for this indicator.
3	*Aid flows are aligned on national priorities* – Percent of aid flows to the government sector that is reported on partners' national budgets.	**Halve the gap** – halve the proportion of aid flows to government sector not reported on government's budget(s) (with at least 85% reported on budget).
4	*Strengthen capacity by co-ordinated support* – Percent of donor capacity-development support provided through co-ordinated programmes consistent with partners' national development strategies.	**50% of technical co-operation flows** are implemented through co-ordinated programmes consistent with national development strategies.
5a	*Use of country public financial management systems* – Percent of donors and of aid flows that use public financial management systems in partner countries, which either (a) adhere to broadly accepted good practices or (b) have a reform programme in place to achieve these.	PERCENTAGE OF DONORS TARGET — SCORE* **All donors** use partner countries' PFM systems. — 5+ **90% of donors** use partner countries' PFM systems. — 3.5 to 4.5 PERCENTAGE OF AID FLOWS TARGET — SCORE* **A two-thirds reduction** in the % of aid to the public sector not using partner countries' PFM systems. — 5+ **A one-third reduction** in the % of aid to the public sector not using partner countries' PFM systems. — 3.5 to 4.5
5b	*Use of country procurement systems* – Percent of donors and of aid flows that use partner country procurement systems which either (a) adhere to broadly accepted good practices or (b) have a reform programme in place to achieve these.	PERCENTAGE OF DONORS TARGET — SCORE* **All donors** use partner countries' procurement systems. — A **90% of donors** use partner countries' procurement systems. — B PERCENTAGE OF AID FLOWS TARGET — SCORE* **A two-thirds reduction** in the % of aid to the public sector not using partner — A **A one-third reduction** in the % of aid to the public sector not using partner countries' procurement systems. — B
6	*Strengthen capacity by avoiding parallel implementation structures* – Number of parallel project implementation units (PIUs) per country.	**Reduce by two-thirds** the stock of parallel project implementation units (PIUs).

7	*Aid is more predictable* – Percent of aid disbursements released according to agreed schedules in annual or multi-year frameworks.	**Halve the gap** halve the proportion of aid not disbursed within the fiscal year for which it was scheduled.
8	*Aid is untied* – Percent of bilateral aid that is untied.	**Continued progress over time.**
	HARMONISATION	**TARGET FOR 2010**
9	*Use of common arrangements or procedures* – Percent of aid provided as programme-based approaches.	**66% of aid flows** are provided in the context of programme-based approaches.
10	*Encourage shared analysis* – Percent of (a) field missions and/or (b) country analytic work, including diagnostic reviews that are joint.	(a) **40% of donor missions** to the field are joint. (b) **66% of country analytic work is joint.**
	MANAGING FOR RESULTS	**TARGET FOR 2010**
11	*Results-oriented frameworks* – Number of countries with transparent and monitorable performance assessment frameworks to assess progress against (a) the national development strategies and (b) sector programmes.	**Reduce the gap by one-third** – Reduce the proportion of countries without transparent and monitorable performance assessment frameworks by one-third.
	MUTUAL ACCOUNTABILITY	**TARGET FOR 2010**
12	*Mutual accountability* – Number of partner countries that undertake mutual assessments of progress in implementing agreed commitments on aid effectiveness including those in this Declaration.	**All partner countries** have mutual assessment reviews in place.

Source: OECD (2008, p.9)

The progress of the aid effectiveness agenda created in 2005 was monitored through the Survey on Monitoring the Paris Declaration (SMPD) conducted between 2006 and 2011. Based on the set principles and indicators, the SMPD collected relevant aid data from donor countries and disseminated country surveys through participating countries' government which targeted key stakeholders such as appointed National Coordinators that led the survey process in each country, aid agencies, and DAC Secretariat and personnel (OECD, 2006). A total of 78 countries participated in the last round of the survey in 2011 on a voluntary basis (OECD, 2011a). These stakeholders then reached consensus on the compiling of a Country Worksheet that contained statistical findings and qualitative commentary on the selected indicators used to generate insights on the progress of the Paris Declaration and provide recommendations (OECD, 2006).

The Paris Declaration did not enact a contractual relationship among its signatories, hence raising concerns about a lack of political weight on compliance among donors and recipients, as well as among DAC and non-DAC donors (Bissio, 2013; Glennie & Sumner, 2016). In parallel, insufficient technical clarity created obstacles for implementing the monitoring framework (Kindornay, 2011; Glennie & Sumner, 2016). Some aspects of the Paris Declaration were even considered either unrealistic to apply in certain contexts or inappropriate for certain actors engaged in development cooperation.

The principle ***Harmonization*** was proven to lag far between theory and practice partly due to the absence of sanctions against non-compliance (McKee et al., 2020). The tension between the principles ***Alignment*** and ***Managing for results*** is also illustrated by McKee et al. (2020) when aid agencies' interventions within the pursuit of development results will ultimately conflict with country-owned plans. The last principle ***Mutual accountability*** was historically the most controversial in the aid effectiveness agenda as it raised the question of accountability for what and to whom (Egan, 2008). Another issue surrounding an accountability principle framed by the OECD DAC is that how non-DAC donors that operate beyond the aid effectiveness framework can apply these indicators and standards (Kindornay, 2011).

Moreover, the reliance of the framework on the World Bank's assessments for some indicators consolidated the criticisms that the SMPD's results could be skewed to donors' perspectives (UNECOSOC, 2008a). Concerning the degree of subjectivity and bias induced from the SMPD's questionnaires, the ambiguous definitions of certain parameters allowed donors to deliberately report as they saw fit and claim their contributions to the indicators, while the recipients' views might not have been given comparably adequate attention (ibid.).

The OECD DAC's establishment of a global framework for evaluating aid effectiveness, though applauded as an acknowledgement of donor-recipient asymmetries in the aid process, was not a comprehensive transformation from the North-South paradigm. As a result, the OECD DAC made an ambitious move at the 4th HLF on Aid Effectiveness in Busan in 2011 to (i) position the evaluation of development cooperation in a broader development effectiveness agenda; and to (ii) to bring new providers in the Global South on board towards genuine global partnerships (McKee et al., 2020; Chaturvedi et al., 2021). Despite the absence of a common understanding of development effectiveness, the North-South Institute attempts to classify development effectiveness by conceptualizations into four categories: (i) organizational effectiveness; (ii) coherence or coordination; (iii) development outcomes from aid; and (iv) overall development outcomes (Kindornay, 2011) (see Table 2).

Table 2. Four categories of development effectiveness

Development effectiveness as ***organizational effectiveness***
• A supply-side driven concept that looks specifically at aid agencies' organizational performance, often used by multilateral organizations to assess how aid is delivered or how well they are achieving stated objectives and goals. • The closet understanding of development effectiveness to aid effectiveness, as it is concerned with the effectiveness and efficiency of ODA delivery rather than on actual development outcomes
Development effectiveness as *development-oriented policy coherence*
• A comprehensive approach to development cooperation that combines country specific and development-oriented aid and non-aid tools based on the realization that non-aid sectors affect the overall development processes. • Donor countries are hence required to make both their aid and non-aid policies harmonize with key concerns of partner countries, including politically sensitive issues such as immigration, border control, trade balances, and agricultural subsidies. • Despite the OECD DAC's continual advocacy for greater policy coherence, a mechanism for aid and non-aid policy coordination at the national level is unavailable in most donor countries due to their unwillingness in formulating such policies.
Development effectiveness as *development outcomes from aid*
• The outcomes aid seeks to achieve and by which it will be measured – a notion that complements the aid effectiveness agenda • Donors are required to assess the results not only in terms of aid delivery efficiency, but also its effect on overall development outcomes. • Embraced by both the UN agencies and the OECD DAC by acknowledging the importance of crosscutting development issues like human rights, gender equality, and environmental sustainability at all stages of development interventions and in assessing development effectiveness.
Development effectiveness as *overall development outcomes*
• The overall development process with a holistic perspective, encompassing all factors affecting the development process as well as how desired development outcomes are decided – the most comprehensive approach • The emphasis is not placed on aid flows but their ability to catalyze and complement alternative resources for development. • Has the potential to connect policy coherence more explicitly to broader development goals and outcomes compared to the implicit connection in the concept of development effectiveness as policy coherence.

Source: Kindornay & Morton (2009), Kindornay (2011), and Rahman & Farin (2019) combined with author's analysis

To measure development effectiveness, the Busan monitoring framework was designed with three principles inherited and enhanced from the Paris monitoring framework (country ownership; focus on results; and transparency and mutual accountability), while two principles on alignment and harmonization were replaced by inclusive partnerships for development (OECD, 2011b). That proved the incomplete departure of the OECD DAC's development effectiveness principles from the previous aid effectiveness agenda. The previous WP-EFF was transformed into the new Global Partnership for Effective Development Cooperation (GPEDC) steering committee to monitor the commitments to development effectiveness principles (Besharati, 2013). Unlike the WP-EFF which was exclusively managed by the OECD DAC, the GPEDC is jointly hosted by the United Nations Development Programme (UNDP) (Chaturvedi et al., 2021).

While some indicators in the GPEDC monitoring framework identified by partner countries as relevant were retained from the Paris Declaration, four out of the five eliminated indicators measured donor performance due to political pressure from donors (CONCORD, 2012). As a result, the measurement of compliance and progress in these areas will either be discontinued or faced with increasing difficulties without comparable data (ibid.). On the other hand, to fill the gaps of the Paris monitoring framework, indicators monitoring the enabling environment for and the contribution of domestic development actors, gender equality, and transparency to development were added (ibid.).

Table 3. Comparison of the Paris and Busan monitoring frameworks

Paris Monitoring Framework	**Busan Monitoring Framework**
Area of continued monitoring:	
Quality of country PFM and procurement systems	
Use of country PFM and procurement systems	
Aid is untied	
Mutual accountability: countries conduct mutual assessments of progress	
Continued area, new approach or indicator:	
Aid flows are reported on budget	Aid flows are on budget, and subject to parliamentary scrutiny
Aid is more predictable: disbursed within the fiscal year for which it was scheduled	Development cooperation is more predictable Annual: disbursed within the fiscal year for which it was scheduled Medium-term: aid covered by indicative forward spending plans
Results frameworks: developing countries have performance assessment frameworks	Results frameworks: all providers of development co-operation use country results frameworks (indicator tbc)
Discontinued area:	**Newly monitored area:**
Partners have operational development strategies	Civil society organisations: the enabling environment for CSOs (tbc)
Donors provide coordinated technical cooperation	Private sector: engagement and contribution to development (tbc)
Donors avoid parallel implementation structures	Transparency: information on development co-operation is publicly available
Donors use common arrangements or procedures (programme-based approaches)	Gender: developing countries have systems that track resource allocations for gender equality and women's empowerment, and make them public

Source: CONCORD (2012, p.24)

On the surface, the Busan Partnership Agreement seemed to be a groundbreaking success in bringing the main Southern providers into a universally agreed framework for evaluating development cooperation, as the document was drafted with the participation of emerging economies (i.e. China, India, and Brazil), and was endorsed by key Southern providers (Besharati, 2013; Almasifard, 2019; McKee et al., 2020; Bracho, 2021). A deeper look, however, reveals the persisting political influence of the old aid effectiveness principles that prevented the complete endorsement of the framework, illustrated by the declining intertest of Southern providers and insufficient attention from even DAC donors for the new development effectiveness agenda in the following years (McKee et al., 2020). The Busan Partnership Agreement still failed to truly endorse the concept of ***Common But Differentiated Responsibilities*** (CBDRs) that was repeatedly emphasized by new providers throughout the discussions processes (Besharati, 2013). The results of the first GPEDC monitoring exercise in which data on SSC activities provided by China and India continue to be monitored against practically the same standards as NSC activities was a clear example for the North's failure in fulfilling their commitment to CBDRs (Bracho, 2021).

Considering the fundamental differences underlying the North-South divide, it is of no surprise that major emerging countries like China, India, South Africa, and Brazil refrain from assessing their aid against the OECD DAC led principles (Besharati, 2013; McKee et al., 2020; Mello e Souza, 2021). The cautions of Southern partners towards joining a global development evaluation framework designed and executed by the North relate to the political and technical pressures implied in being regarded in the same level as traditional donors (McKee et al., 2020).

First and foremost, the fact that SSC is deemed to take broader forms than the OECD's definition of ODA highlights a divergence in the principles of local ownership, and transparency and accountability among NSC and SSC (Mello e Souza, 2021). Second, the DAC group's continual push for a new universality in development cooperation norms can also be translated into an attempt to detract the attention from developed countries' historical responsibilities and unfulfilled commitments to the 0.7% target toward new providers (Besharati, 2013; Hackenesch & Janus, 2013). The third concern arises from the considerable gap in technical capacities between traditional donors and emerging countries. Compared to Northern donors' over 50-year experience in development cooperation, Sothern providers are relatively new to this field, and hence need time to refine their monitoring and evaluation standards and systems of development cooperation to catch up with the North (Besharati, 2013).

Consequently, Southern providers often endorse separate sets of principles for evaluating development effectiveness. In contrast to the extensive mechanisms for knowledge and information exchange built by the OECD DAC in the past decades, there is no common framework for evaluating or reporting activities in SSC. Southern providers are scattered into small groups with distinct interests that operate with different mechanisms. Major emerging economies like China, India and Brazil are barely aware of their counterparts' bilateral policies even when they belong to the same SSC clusters (Hackenesch & Janus, 2013; Fernando, 2019). As most of the evaluations reflect political stances, insufficient attention is placed on measuring outcome, quality, efficiency and effectiveness, and sustainability (Besharati, 2013). The fact that emerging economies have neither standardized the methods of reporting aid flows nor harmonized their activities led to the concerns about impeded access to information on development effectiveness due to low transparency of SSC (Kharas, 2007a; Hackenesch & Janus, 2013).

The need for a common definition and conceptual framework for evaluating SSC motivated the first technical workshop organized by the Network of Southern Think Tanks (NeST) in South Africa in 2015 (Besharati et al., 2017). After the workshop, a monitoring framework based on the SSC principles was developed and piloted through a number of SSC case studies before being revised in 2016 (ibid.). The five dimensions of the NeST framework with its twenty indicators were demonstrated by Besharati et al. (2017) are specified in Table 4. SSC initiatives are evaluated at project and country level (aggregation across SSC projects). Each NeST indicator is accompanied by guiding questions**,** along with suggestions for data collection methods and potential sources of information. The framework is expected to build on data collected and triangulated through document review, stakeholder interviews, and experiential observations (ibid.).

Table 4. NeST principles and indicators for SSC evaluation

INDICATORS	SUGGESTED MEASURES
INCLUSIVE NATIONAL OWNERSHIP – the continued leadership by partner countries on priorities, policy direction, and implementation of the SSC initiatives which evolved from the previous government-to-government relations to the people-centered, inclusive vision of the 2030 Agenda	
Multi-stakeholder partnerships	• Existence of policy frameworks, legal mechanisms, institutional arrangements, and platforms for inclusive and accountable dialogue and joint action in SSC between different state and non-state actors (in both SSC partner countries) • Number and type of actors/organizations taking part in consultations and activities of SSC (taking gender equality into consideration) • Evidence that non-state actors provide inputs and influence programming, policy formulation, design, implementation, and M&E processes of SSC • Frequency and quality of participation (if the consultations are actually occurring and the engagements are meaningful and fruitful)
People-centred inclusivity	• SSC activities support transformational investment to improve the socio-economic conditions of the poorest and most disenfranchised populations, aiming to achieve geographical inclusivity, beyond capital cities and urban areas • SSC partners follow the labor, land, safety, environmental and social standards of both partner countries (whichever is higher) • Partner countries have strong national regulatory frameworks to safeguard labor rights, safety standards, land issues, and social and environmental protection • Amount of resources allocated towards poverty alleviation and social inclusion, taking into consideration gender equality. Percentage of activities and budget focusing on marginalized and vulnerable groups • Inclusion of women, youth, indigenous, marginalized and vulnerable population groups in the planning and implementation of the SSC initiative, demonstrated in the outcomes/results of the project
Demand-driven	• Number of SSC initiatives/projects where there is evidence of a request by the recipient partner • Formulation of projects/programs based on beneficiary country request • Level and nature of participation of recipient country in project/program development • SSC initiative is linked to recipient country's development strategy Number of SSC project initiatives that are aligned to national priorities of the recipient country • Extent of use of recipient country results framework by SCC provider
Non-conditionality	• Formulation of projects/programs is based on the mutually agreed bilateral cooperation framework • Number of initiatives that include any form of policy conditionality (tacit or implicit)
HORIZONTALITY – shared responsibility, management and implementation in all phases of development interventions based on a strong spirit of solidarity, fairness and mutuality	
Mutual benefit	• SSC agreement document has stated benefits for each partner country. Benefits for both partners are transparently identified and articulated • Stated benefits in SSC agreements between countries have been achieved/attained (levels: political; socio-economic; strategic) • Evidence of mutual learning experiences as shared by SSC partners
Shared decisions & resources	• Existence of technical discussions, scoping missions or joint evaluations • Existence of mechanisms for regular joint decision-making • Ratio of local human resources in management/technical/unskilled activities by the different partners • The ratio of the executed/budgeted costs borne by each partner

Trust & solidarity	• Existence of common interests, objectives, principles and approaches between SSC partners, whether in domestic or foreign policy • Length and quality of the relationship between SSC partners • Frequency and quality of communication and interactions between partners • Shifting from short-term aid delivery and assistance to a long-term vision of development cooperation and partnership
Global political coalitions	• Evidence of joint positions taken at multilateral policy forums • Number of formal international coalitions created and active (ie, BRICS, Africa–South America Summit, Union of South American Nations, etc.) • Joint actions, especially within the UN, regional and other bodies where both SSC partners are members
SELF-RELIANCE & SUSTAINABILITY – how recipient countries are empowered to control of development programs and projects in the longer term with the aim of reducing external dependency through a steady increase in local capacity partly through knowledge and technology transfers	
Capacity building (people, institutions, systems)	• Number of capacity-building initiatives within a given SSC agreement • Number of people trained/or part of knowledge exchanges within SSC capacity-building initiatives • Capacity-building initiatives aim to build leadership capacities and core skills that cater for the needs of society in the longer run, beyond capacities needed for shorter-term project implementation • Evidence of application of knowledge acquired through SSC • Changes in behavior, and institutional and policy practices, as a result of knowledge gained through SSC
Knowledge & technology transfer	• Number of tools, systems and technology adopted from exchanges • Improved partners' capacity to absorb and adapt technology and skills to meet their specific developmental needs • Technological capacities in developing countries created or strengthened
Use country systems & human resources	• Extent to which SSC is not tied to any predetermined modalities, conditions, materials, institutions or human resources from a provider country • Percentage of tied aid compared to total aid • Use of local financial management and procurement systems (local or national) • Percentage of local human resources and local material resources that are being used in the SSC initiative
Domestic revenue generation	• Evidence of partner countries growing out of dependency and taking over the developmental initiatives through a diversification of the means of national resource mobilization • Evidence of the provider country facilitating the above
ACCOUNTABILITY & TRANSPARENCY – SSC partners to make the information about their development cooperation activities public and accessible, allowing relevant stakeholders to harmonize their activities in accordance	
Data management & reporting	• Both SSC partners possess the institutional frameworks, capacity and political will to collect, analyze, simplify and publish data on a regular basis • Detail, frequency and extent of published SSC information
Monitoring & evaluation for learning	• Existence of effective and quality M&E system at national/institutional/project level • M&E is performed at all stages of the SSC project cycle (baseline, monitoring implementation, ex-post impact evaluations) • Evidence of capacity for M&E activities (i.e., expertise, budget, time) • Evidence that partners are using the results of M&E processes to inform policies and programs, and promote improvement and learning – knowledge is generated from M&E
Transparency & access to (published) information	• Evidence of hubs/sources/platforms/mechanisms for public access to SSC information • SSC information is published on a timely and regular basis • Information that is published is comprehensive, as well as backward and forward looking • Evidence of scrutiny of SSC information by parliament, civil society organizations, academia and media

Mutual accountability & joint reviews	• Existence of review mechanisms that ensure reciprocal accountability • Partner countries undertake regular reviews at both the technical and political level to assess progress and challenges in implementing agreed commitments • Evidence that results from joint reviews are followed up, converted into action and integrated into future SSC activities
DEVELOPMENT EFFICIENCY – focuses on both efficiency and effectiveness, particularly in terms of time and cost, which is based on a sound coordination in the multiple-player systems and processes of implementing SSC activities in both Southern providers and host countries	
Flexibility & adaptation	• Existence of local, context-specific elements in SSC projects • Evidence of flexibility, adaptation and changes as the project unfolds • Evidence of successful scale-up/take-up by the national and local partners of the project activities
Time & cost efficiency	• Ratio between budgeted and actual costs • Ratio between planned and actual implementing time • Average duration of SSC projects/initiatives (start–completion dates); degree of bureaucratic delays • Time and cost of SSC activities compared to those of NSC activities in similar projects and contexts
Internal & external coordination	• Existence of a structured country coordination mechanism in the recipient country with respect to the development partner's coordination • Participation of the SSC provider in the recipient country's development cooperation coordination mechanisms • National agencies of provider and recipient countries are coordinated and coherent with regard to their development cooperation with other partner countries • Existence of a centralized agency to coordinate development cooperation activities
Policy coherence for development	• Absence of policy incoherence – negative externalities • SSC partners' aid, trade, investment, peace and migration policies are consistent with other Southern countries' development efforts • SSC contributes to global public goods and the achievement of the SDGs, under the principle of common but differential responsibilities

Source: Author's synthesis based on Besharati et al. (2017)

The debates over the use of either quantitative or qualitative approaches in evaluating SSC led to a consensus on a mixed-method approach that allows flexibility and complementarity in the NeST framework. The limited data availability on SSC projects persists as the attempts to keep track of SSC data made by UN agencies, development banks, and regional information hubs can only capture a small part of spread-out SSC activities that are poorly documented and/or irregularly published (Besharati et al., 2015). Therefore, qualitative information that typically takes form of case studies was suggested as a complementarity for the knowledge gaps in SSC (ibid.). Such qualitative information is often targeted by the criticism on its subjectivity (Besharati et al., 2017). The revised NeST framework in 2016 hence suggested a scoring system that rates each indicator and dimension (ibid.).

Similar to the OECD DAC's aid effectiveness agenda, the NeST framework raised the concerns about the overly free interpretations of its dimensions and indicators that can lead to skewed evaluation results due to its heavy reliance on qualitative methods (Ali, 2018). The inclusion of some indicators with quite broad concepts such as "global political coalitions" or "trust and solidarity" also attracted criticisms of how to measure and use these principles to assess SSC (ibid.). Some indicators such as 'policy coherence for development' and 'international alliances' that even surpass the analysis of bilateral partnerships at the project or country level may need to be integrated under new dimensions or put in other analytical instruments (Besharati & Rawhani, 2016).

Overall, most of the afore discussed frameworks and indicators positioned a heavy focus on measuring development cooperation as development finance and as outcomes of development cooperation from aid. These frameworks and indicators hence are mere donor-centered measurement of aid effectiveness, leaving little room for recipient countries' perception to be consulted in the evaluation process. Crosscutting development issues that can be addressed through development cooperation are also often excluded from these monitoring frameworks. However, they still have a crucial role in setting the concrete foundation for more comprehensive and meaningful measuring approaches to be developed.

Chapter 3. Trilateral development cooperation for enhanced development effectiveness

I. North-South-South Cooperation as a new development cooperation modality

In response to the increasing constraints on aid provision from the supply side and the rising demand for aid from the demand side, it is important that the pressure should be moved from increasing aid volume to increasing the effectiveness of development cooperation. The crucial question of who does what was not clearly addressed during the 4th HLF with both Southern providers and Northern donors accusing the other side of either exaggerating the role of SSC or assuming no commitments (Besharati, 2013). An effort to tackle this question was undertaken by Bracho (2021) who proposes 4 different scenarios for a burden-sharing model in development cooperation based on the analysis of collective and separate cost and benefits for DAC donors, emerging powers, and recipient countries. Bracho (2021)'s analysis suggests that Scenario C in which emerging economies identified as new providers in the South with differentiated responsibilities while traditional donors hold their usual aid commitment provides the best collective outcome.

Figure 3. The burden-sharing game

Scenarios	*DAC donors (DDs)*		*Southern emerging powers (EPs)*		*Recipient countries (common good)*	*North-South divide*
	Identity	**Costs**	**Identity**	**Costs**	**Total benefits**	**Status**
A) Status quo with only responsibilities for DDs	Donor	5	SSC partner	0	***5***	Unchanged
B) Equal responsibilities for DDs and EPs	Donor	5	Donor	5	***10***	Unchanged
C) Differentiated responsibilities for EPs (with no change for DDs)	Donor	5	SSC ***provider***	2	*7*	Nuanced (adapted to new realities)
D) Towards no responsibilities	Provider	→0	SSC partner	0	***→0***	Dissolved

Source: Bracho (2021, p.374)

Bracho (2021)'s burden-sharing model can serve as the foundation for a new development cooperation modality other than SSC and NSC that leverages on the comparative advantages of both Southern and Northern actors. In reality, such a development cooperation modality – NSSC or trilateral development cooperation (TDC) – has already been conceptualized and put into practice.

Historically, TDC originated from the implementation of technical cooperation projects between two countries in the Global South in the 1970s under the framework of SSC (Lengfelder, 2019). However, as these projects were frequently faced with inadequate fundings, administrative support and financial resources began to be supplemented by DAC donors (ibid.). This modality of development cooperation then was formalized with the first trilateral cooperation projects in the end of the 1990s, in which three stakeholders with at least one DAC donor and/or multilateral agency, one Southern provider, and one recipient country from the Global South are involved with specific roles assigned (ibid.).

Despite the fact that there is little consensus on TDC principles across the aid community after over a decade of implementation, the Global Partnership Initiative (GPI) on Effective Triangular Cooperation, which was co-founded by Mexico and Canada at the 2nd High Level Meeting of the GPEDC in 2016, managed to put forward nine principles for NSSC. In addition to the similar principles of national ownership, result orientation, inclusive partnerships, transparency and accountability endorsed in NSC and SSC, TDC has integrated four other key principles in line with the 2030 Agenda. In particular, NSSC principles value locally-driven innovation and co-creation, sustainability related knowledge sharing, integration of crosscutting development topics such as gender equality and human rights, and alignment with the SDGs' leave no one behind principle (GPI, 2019).

Table 5. Comparison among NSC, SSC, and NSSC monitoring principles

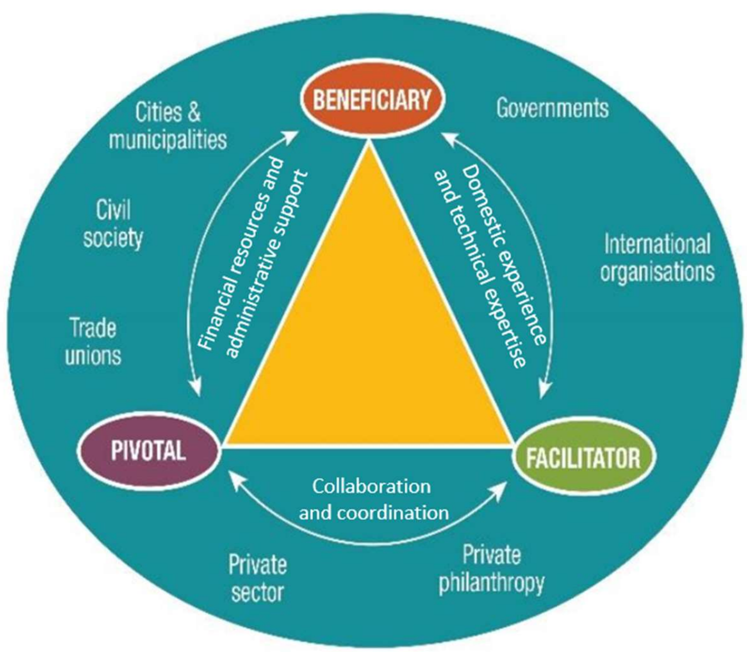
NSC Monitoring Principles	SSC Monitoring Principles	NSSC Monitoring Principles
Ownership of development priorities by developing countries	Inclusive national ownership	Country ownership and demand-driven co-operation
Focus on results	Horizontality	Focus on results-oriented approaches and solutions
Inclusive development partnerships	Self-reliance & sustainability	Inclusive partnerships and multi-stakeholder dialogues
Transparency and accountability to each other	Accountability & transparency	Shared commitment
	Development efficiency	Transparency and mutual accountability
		Innovation and co-creation
		Joint-learning and knowledge-sharing for sustainable development
		Advance gender equality and the empowerment of women and girls
		Leaving no one behind

Source: Author's synthesis based on McKee et al. (2020), Besharati et al. (2017), and GPI (2019)

According to McEwan and Mawdsley (2012), traditional donors and/or multilateral partners act as proactive contributors of financial resources, institutional capacity, and development experience accumulated from the profound involvement in development. This role is referred as ***facilitating partners*** by Development agencies from Germany and Japan, two countries leading the DAC club in the in with TDC projects since early stage (JICA Research Institute, 2012; BMZ, 2022). For their part, Southern providers take the role of ***pivotal states*** that also bring to the table their knowledge and expertise particularly drawn from the domestic experience relevant to the context of the recipients (McEwan & Mawdsley, 2012). Under the DAC framework for TDC, pivotal states are also requested to share occasional additional funding with facilitating partners (BMZ, 2022). Last but not least, the crucial role played by recipient countries or ***beneficiary partners***, identified as ODA-eligible countries, is to request support to address a specific development challenge based on which customized TDC will be formed (Lengfelder, 2019; BMZ, 2022). While the characteristics of DAC donors and recipient countries are specified in literature on development cooperation, clarification needs to be made on the identity of Southern providers or pivotal states. Besides the common feature of belong to the middle-income country group, these countries embody political significance in regional and international relations either because of the scale of their economies or their recent developmental progress (Lengfelder, 2019). More importantly, some countries are crucial in GPGs provision, and thus are indispensable in international dialogues (ibid.).

A key characteristic that distinguishes TDC projects from bilateral cooperation is the involvement of a wide variety of partners rather than the restriction of two roles played by the donor and recipient country. Past and potential partners can consist of line ministries, local and regional authorities, thematically specialized agencies, academia, civil society organizations (CSOs), non-governmental organizations, and private companies (BMZ, 2022). This characteristic addresses the longstanding criticism of CSOs and private enterprises about their insufficient representation and consultation in development processes despite the increasingly important role that they play in development projects in the Global South (Kumar et al., 2016; Rahman & Farin, 2019; Chaturvedi et al., 2021).

Figure 4. Roles in trilateral cooperation



Source: GPI (2019, p.12) combined with author's analysis

TDC in reality can be illustrated through Germany's collaboration with Chile in a development program to promote youth employment at the request of the Dominican Republic (Lengfelder, 2019). The program, which was financed by a triangulation fund set up by the German development agency (GIZ) and the International Cooperation Agency of Chile (AgCI), entailed the translation of Chile's experience in integrating vulnerable young people living in rural areas into the labor market into the context of the Dominican Republic (Albütz, 2012). Another example is Malaysia's technical cooperation with Japan and UN agencies to bring officials from developing countries to attend trainings and study visits covering topics of technological and industrial development in Malaysia (UNECOSOC, 2008b).

The last decade has marked a growing attention on TDC, in which this relatively new form of modality is increasingly acknowledged and discussed at the most influential international forums on development cooperation (Lengfelder, 2019). NSSC has also expanded in scale and coverage with 16 DAC donors already engaged in the implementation of TDC projects and a growing number of Southern providers frequently involved trilateral development interventions across Africa, Asia, Latin America and Eastern Europe (Fordelone, 2011).

However, with the already criticized NSC and SSC, the skepticism surrounding the contribution of a 'complementary' modality like NSSC to improving overall development effectiveness is worth exploring. According to (Kharas, 2007a), there are at least two gaps left by NSC and SSC that NSSC can fill in: the legitimacy gap and the credibility gap.

Based on the international relations theory's constructivist approach, Lengfelder (2019) illustrates how the effectiveness of certain endeavors can be enhanced by increasing the legitimacy of actors involved. As inclusiveness, fairness, and adequate processes shape the perception of legitimacy and control the degree to which countries approve new procedures, it is supposed to be easier for states to convince others when perceived as legitimate actors (Raustiala & Slaughter, 2002; Barnett, 2008). This approach can be employed in development cooperation, in which development effectiveness depends on whether beneficiary states perceive new providers as more legitimate than traditional donors. The belief that Southern providers' engagement boosts the relevance and significance of their advices to fellow developing countries involved in NSSC is rooted in their vast experience and lessons learned accumulated on poverty reduction, international cooperation funds management, and development transition (Lengfelder, 2019). Equally important in legitimizing the role of Southern providers is the fact that they in most cases share regional background and language, and are generally acquainted with the recipients' local circumstances, which allows them to be in better position compared to DAC donors to provide tailored assistance to the recipients' needs (Kumar, 2008; UNECOSOC, 2008b; Fordelone, 2011).

How the effectiveness gap can be bridged through NSSC is more straightforward. The first and foremost aspect to be considered is cost effectiveness with pivotal countries expected to provide goods and services at a lower rate and through more cost-effective technologies and expertise that are already adapted to the contexts of developing countries (Kumar, 2008). Furthermore, more cost-effective projects supposedly enable development cooperation to be scaled up, resulting in more projects to be implemented with fewer fundings (Lengfelder, 2019). The inclusion of Southern providers in existing NSC projects with established planning, expertise, and infrastructure hence reduces overall project costs directly through saving on the cost for design and implementation (Kumar, 2008; Fordelone, 2011). Second, TDC presents to new providers the chance to strengthen development cooperation capacities through capacity building and learning with traditional donors (McEwan & Mawdsley, 2012; Lengfelder, 2019), which eventually feeds into overall enhanced development effectiveness. The third contribution of NSSC to enhanced cost effectiveness is the claim that the engagement of other Southern partners may enable recipient countries to assert more national ownership and obtain better negotiating power (McEwan & Mawdsley, 2012) – a perquisite to the formation of development interventions that response to beneficiary states' needs.

Viewing development effectiveness from a political perspective, NSSC serves as a platform to bring non-DAC development actors closer to international norms and standards (McEwan & Mawdsley, 2012). This is seen as a strong value added of TDC especially in the partnerships between Latin American countries with DAC donors based on the evidence collected from the 8 projects of the European Union – Latin America and the Caribbean Facility for Triangular Cooperation (ADELANTE) during their first phase in the period of 2016-2019 (Piefer-Söyler & Aigües, 2020). In most ADELANTE projects, traditional donors can be linked to a dense network of Southern providers and partners, which are otherwise disunited, through its collaboration with the pivotal states for the exchange of experience and knowledge (ibid.).

When connecting NSSC with the SDGs, the 2030 Agenda specifically recognizes TDC as a vehicle for capacity building and SDGs implementation through national plans in developing countries (GPI, 2019). Based on data and information from the field and TDC case studies, GPI (2019) attributes the implementation of NSSC to the 2030 Agenda's principles of universality, shared responsibility and leave no one behind. The contribution of trilateral development projects to the principle of leave no one behind is illustrated with a series of concrete examples with promising outcomes, one of which is the collaboration between Germany and Argentina in consolidating the healthcare network and services in Bolivia for reduced infant mortality based on Argentina's expertise and experience in treating heart diseases. The tradeoffs between development and sustainability are also addressed in TDC projects which crosscut at least 6 environment related SDGs (ibid.).

The intertwined linkages between TDC and the crosscutting issues in the 2030 Agenda can be considered as the utmost important contribution of NSSC to development effectiveness in an aid architecture with increasing interconnectedness (GPI, 2019). In fact, the trilateral development projects particularly in Ibero-American countries directly addressed all 17 SDGs with greater focus on the region's major issues such as SDGs 2, 3, 8, and 16 (SEGIB, 2018). Moreover, Ibero-American TDC is closely geared towards climate change related development goals that are critically in need of more attention namely SDGs 11, 13, 14, and 15 (ibid.). The GPI's analysis based on OECD data on NSSC since 2012 portrayed a similar picture at the global scale, in which TDC projects encompassed over 14 sectors with major contributions to the most relevant development areas to development countries such as agriculture and food security, healthcare, environmental protection, and energy (GPI, 2019).

Despite the concrete benefits for development effectiveness attributed to NSSC, actors involved in TDC will need to address major shortfalls to ensure the legitimacy of this new development paradigm including high transaction cost, dominated strategic interests, and undermined national ownership.

The rise in transaction costs when involving an additional actor in traditional NSC or SSC has been a decisive counterargument against the effectiveness and efficiency of NSSC (Lengfelder, 2019; McEwan & Mawdsley, 2012). As cooperation involving multiple partners with unformulated operational procedures and policy guidelines, and long and cumbersome negotiation processes is certainly more time and resource consuming than bilateral cooperation, transaction costs for TDC are assumed to be notably high (Fordelone, 2011; Lengfelder, 2019). The problem of high transaction cost is amplified because NSSC tends to integrate a much larger range of actors instead of three collaborating agencies (McEwan & Mawdsley, 2012), which reaches up to eleven parties in some cases (Schulz, 2010). The increased overall expenditures as a result raises the question on whether additional costs can be offset by enhanced development effectiveness or even on the actual purpose of NSSC (Lengfelder, 2019).

The pursuit of strategic interests from both traditional donors and pivotal states' sides is deemed the underlying motive for their engagement in TDC. On the one hand, from DAC donors' perspective, having emerging economies in the Global South with growing political and economic significance as strategic cooperation partners is becoming increasingly crucial for international relations (Lengfelder, 2019). On the other hand, for Southern countries, the role of new provider is politically attractive as it can consolidate international prestige and foster relation with global powers that are DAC members (ibid.). According to McEwan & Mawdsley (2012), the chase after strategic interests, either contentious nor disguised under neutralized humanitarian or development missions, is not novel in foreign aid. However, the issue of strategic interests in NSSC is closely connected to the concern about beneficiary states' ownership, particularly about the extent these interests align with the recipient countries' development needs rather than a mere tool for achieving the donor agenda (ibid.).

Critics legitimately doubt how much ownership is granted to recipient countries in a cooperation modality primarily initiated, financed, and administrated by DAC donors (Lengfelder, 2019), in which the power to control aid flows, and to hold other stakeholders accountable is usually in traditional donors' hand (McEwan & Mawdsley, 2012). The presence of a pivotal state seems to cast little influence on the relationship between traditional donor and recipient country, as the latter is still often subordinated to the former's priorities and structures (ibid.). Simultaneously, power asymmetries arise when two developing and/or neighboring countries take the roles of new providers and recipients in TDC as well, especially if the pivotal state with comparatively significant economic size attempts to assert dominance on the beneficiary country (Lengfelder, 2019). Such an assumption that mutual understanding and interests between two states simply stem from belonging to the same income category or sharing regional identity neglects both the difficulties encountered by the recipients in assuming ownership of TDC projects and their suspicion of Southern partners' intentions (McEwan & Mawdsley, 2012).

To ensure national ownership in NSSC, Lengfelder (2019) suggests a set of four fundamental criteria for selecting suitable pivotal state that can facilitate the beneficiary country's ownership throughout the design to implementation of TDC projects while avoiding conflicts as much as possible. The aim of these criteria is to enable the recipient country to sort out a legitimate development partner with transferable expertise relevant to the recipient's development needs.

> "1. The new provider and recipient speak the same language.
>
> 2. The partner countries carry as little historical or current conflict burden as possible.
>
> 3. There is a clear value added to the project caused by the integration of the new provider. The added value can emerge from similar – climate or geography (for agricultural projects); – institutional settings (for the design of public policies); – cultural circumstances (for example, Indigenous populations); – political conditions (such as transition to democracy; previous armed conflict); – economic structures (for example, commodities; coast access; for projects on trade promotion).
>
> 4. The recipient countries select the new provider and the area of cooperation; and they assume the ownership of the project design, as well as the leadership during the project implementation." (Lengfelder, 2019, p.130)

Although the probability of effective NSSC increases with the higher number of criteria being met, the contribution of each criterion to development effectiveness is not the same across all cooperation. For example, the fourth criterion on ownership, which is considered as the most crucial to formulating and executing effective development projects, can substitute for some of the other criteria (Lengfelder, 2019).

Other key technical and political recommendations by Lengfelder (2019) to ensure the recipient country's developmental benefits are prioritized and not overshadowed by strategic interests include budget separation by purposes and strengthened multilaterals' role. There should be separate envelops, one of which is for general international cooperation as prioritized by the traditional donor, while the other is solely for development needs as identified by the beneficiary state. Furthermore, international organizations, particularly UN agencies, with relatively neutral yet influential position in the global arena are deemed to better represent the interests of developing countries. UN agencies are also widely acknowledged for their capacity and experience in administrating multistakeholder development projects at a large scale – a substantial quality for the donor in NSSC.

II. Evaluating the effectiveness of NSSC

Similar to SSC, the evaluation of NSSC is relatively limited mainly due to the lack of commonly agreed framework that can be systematically employed between traditional donors and Southern providers. By endorsing a framework that can be applied at both country and project levels, more rigorous evaluations can be enabled to contribute to designing national development plans. Attempts to design such a global evaluation framework and link it with the 2030 Agenda have recently and prominently been undertaken by the GPEDC with its biennial monitoring rounds with a set of indicators derived from the development effectiveness principles. Other efforts include the Center for Global Development's regularly updated Quality of Official Development Assistance Assessment (QuODA), and the Overseas Development Institute (ODI)'s newly developed Principled Aid Index. Each set of indicators has its own strengths and shortcomings when put in practice.

The OECD-UNDP's GPEDC Monitoring Framework

Three years after its foundation, the GPEDC conducted the first monitoring round on global development cooperation in 2014. The first report assessed progress and proposed actions to move forward selected commitments made at the 4th HLF in Busan based on an agreed monitoring framework and a set of ten indicators with set targets to be achieved by 2015 for each indicator (GPEDC, 2014). When the 2030 Agenda and its 17 SDGs were globally endorsed in 2015, the GPEDC monitoring framework aligned its indicators with three indicators under SDGs 5 and 17, and conducted the second monitoring round in 2016 against the new SDGs (GPEDC, 2016). To mark the paradigm shift from aid effectiveness to development effectiveness, the donor-recipient relation is completely replaced by the development partner-partner country relation in the discourse of the new paradigm (Besharati, 2013; McKee et al., 2020). Details on the ten indicators along with specific targets are summarized in Table 6 based on the author's synthesis of information from GPEDC's reports of 2016 and 2019 monitoring rounds, the 2018 Monitoring Guide for National Coordinators from Participating Governments, and the Technical Companion Document to the 2018 Monitoring Guide.

Table 6. The Busan monitoring principles and indicators

Indicators	**What is measured?**	**Target for 2015**
PRINCIPLE 1 – FOCUS ON DEVELOPMENT RESULTS **Development efforts must have a lasting impact on eradicating poverty and reducing inequality and on enhancing developing countries' capacities so that they are in alignment with their own priorities.**		
Indicator 1a. Development partners use those national results frameworks to align, design and monitor the results of their development co-operation activities	• Percentage of new development interventions that draw their objectives from country-led results frameworks • Percentage of results indicators drawn from country-led results frameworks • Percentage of results indicators monitored using government sources and monitoring systems • Percentage of new interventions that plan a final evaluation with government involvement	All providers (100%) of development cooperation use country results frameworks
Indicator 1b. Governments have set national results framework(s) to define their development priorities and results	Percentage of countries that have established priority-setting mechanisms at the national and/or sector levels	
PRINCIPLE 2 – COUNTRY OWNERSHIP OF DEVELOPMENT CO-OPERATION **Partnerships for development can only succeed if they are led by developing countries implementing approaches that are tailored to country-specific situations and needs.**		
Indicator 5a. Development co-operation is predictable: annual predictability	Percentage of development co-operation is predictable (annual)	90% of funding is disbursed as scheduled
Indicator 5b. Development co-operation is predictable: medium-term predictability	Percentage of development co-operation is predictable (medium-term)	Plans cover 92% of estimated funding for 2016; 85% for 2017; 79% for 2018.
Indicator 9a. Governments strengthen their public financial management and procurement systems	Percentage of countries with strengthened country systems	50% of funding uses country systems
Indicator 9b. Development partners use countries' own public financial management systems to implement their co-operation programs with partner governments	Percentage of development co-operation in which development partners use country systems	
Aid is untied (10)	Percentage of untied official development assistance	Continued progress over time
PRINCIPLE 3 – INCLUSIVE PARTNERSHIPS FOR EFFECTIVE DEVELOPMENT **Openness, trust, mutual respect, and learning lie at the core of effective partnerships, which recognize the different and complementary roles of all actors.**		
Indicator 2. Civil society organizations operate within an environment that maximizes their engagement in and contribution to development	Percentage of the countries satisfying all these elements: 1. Space for multi-stakeholder dialogue on national development policies 2. CSOs apply the principles of accountability and transparency 3. Official development co-operation with CSOs 4. Legal and regulatory environment	Continued progress over time
Indicator 3. Quality public-private dialogue promotes private sector engagement (PSE) and its contribution to development	Global average scores across these four dimensions: 1. Availability of instruments to facilitate dialogue 2. Government willingness to engage 3. Private sector willingness to engage 4. Existence of potential champions	Continued progress over time

PRINCIPLE 4 - TRANSPARENCY AND ACCOUNTABILITY FOR EFFECTIVE DEVELOPMENT Mutual accountability and accountability to the intended beneficiaries of development cooperation, as well as to respective citizens, organizations, constituents, and shareholders, is critical to delivering results. Transparent practices form the basis for enhanced accountability.		
Indicator 4. Transparent information on development cooperation is publicly available	Number of development partners making information on development co-operation public across the three global data repositories and standards	Implement the common open standard for electronic publication of information on resources provided through development co-operation
Indicator 6. Development co-operation is included in budgets subjected to parliamentary oversight	Percentage of development co-operation that is on budget	85% reported on budget
Indicator 7. Mutual accountability among development partners is strengthened through inclusive and transparent reviews at country level	Percentage of countries with inclusive mutual assessment reviews	All developing countries (100%) have inclusive mutual assessment reviews in place
Indicator 8. Governments have systems to track public expenditure for gender equality and women's empowerment	Percentage of countries that track public allocations for gender equality and women's empowerment	All developing countries (100%) have systems that track and make public resource allocations for gender equality and women's empowerment

Source: Author's synthesis based on GPEDC (2016), GPEDC (2018a), GPEDC (2018b), GPEDC (2018c), GPEDC (2019), and (Bhattacharya et al., 2021)

Prior to the third monitoring round in 2018, the reform of the GPEDC monitoring framework took place again in 2017 to address the gaps in information and methodologies and enable greater alignment with the 2030 Agenda, though the changes added to the 2018 monitoring framework were not major (GPEDC, 2018a). Both the 2016 and 2018 GPEDC monitoring rounds still measure progress against the non-updated 2015 targets. Although adjustment and changes were suggested to all indicators, only four out of thirteen sub-indicators were amended and updated. The adjustments, though limited in number, made certain efforts in addressing major concerns raised on both the previous Paris Declaration indicators and the 2014 monitoring round indicators. For instance, the criticism on the reliance on the World Bank's assessments for measuring some effectiveness indicators was taken into account with the World Bank's Country Policy and Institutional Assessment (CPIA) score replaced by the Public Expenditure and Financial Accountability (PEFA) framework for Indicator 9 (GPEDC, 2019). The adjustments in the 2018 monitoring round are summarized in Table 7 based on the author's synthesis of information from GPEDC's reports of 2016 and 2019 monitoring rounds, and the Concept Note for the Global Partnership Monitoring Framework for 2030.

Table 7. Changes adopted in the 2018 GPEDC monitoring round

What is measured?	Shortcomings identified in 2017	Proposed improvements	What is adjusted/changed?
PRINCIPLE 1 – FOCUS ON DEVELOPMENT RESULTS			
Indicator 1b. Governments have set national results framework(s) to define their development priorities and results			
Percentage of countries that have established priority-setting mechanisms at the national and/or sector levels	Indicator only assesses existence of national result framework(s)	Assess the quality of national result framework(s)	The indicator was changed to Indicator 1b. Countries strengthen their national results frameworks A new measurement was created based on the four criteria and eleven sub-elements for assessing quality: (1) Setting transparent, country-led results frameworks (2) Prioritizing development results (3) Monitoring results at country level (4) Using the results information
PRINCIPLE 2 – COUNTRY OWNERSHIP OF DEVELOPMENT CO-OPERATION			
Indicator 9a. Governments strengthen their public financial management (PFM) and procurement systems			
Percentage of countries with strengthened country systems	Current indicator (World Bank CPIA-13) offers limited country coverage and no disaggregated information	Use selected PEFA indicators to provide an objective, recognized measure of quality of country systems	The measurement was changed from the Quality of Budgetary and Financial Management scale in the World Bank's CPIA to the nine dimensions in the Public Expenditure and Financial Accountability (PEFA) framework, divided into four categories: budget, procurement, audit, and financial reporting. The selection of dimensions considered the core elements of PFM systems and reflected the same PFM components measured by CPIA.
Indicator 9b. Development partners use countries' own public financial management systems to implement their co-operation programs with partner governments			
Percentage of development co-operation in which development partners use country systems	Reporting quality can improve (interpretation, reporting gaps); No information about actual donor policy	Improve guidance and validation process; Include a qualitative question about donor policy	The measurement of this indicator was changed in accordance with Indicator 9a.
PRINCIPLE 4 - TRANSPARENCY AND ACCOUNTABILITY FOR EFFECTIVE DEVELOPMENT			
Indicator 4. Transparent information on development cooperation is publicly available			
• **Number of development partners making information on development co-operation public across the three global data repositories and standards** • **Percentage of partner countries that have one or more information management system in place to collect information on development co-operation at country level** • **Percentage of development partners in country that report to the country's information management systems**	Difficult interpretation of transparency assessments; Only global transparency	Simplify reporting; Assess country level transparency	The measurement of this indicator was changed to include systems and standards that provide online data on development co-operation at both the global level transparency and the country level transparency element

Source: Author's synthesis based on GPEDC (2016), GPEDC (2017), and GPEDC (2019)

To guide the monitoring process, the GPEDC published two monitoring guides, one for the national coordinators that are assigned by beneficiary country governments, and the other one for the headquarter focal points appointed by the donors such as bilaterals, multilaterals, and vertical funds (GPEDC, 2018a). Reflecting the stress on country-level implementation of the Busan commitments, a country-led approach is employed in which developing countries can decide how and when they participate in the monitoring exercise, based on their own country priorities, planning cycles, and data (GPEDC, 2014). Therefore, national coordinators play the key role of leading the monitoring exercise and liaising with other stakeholders to collect and report data and information for selected indicators from existing national monitoring processes and consultations with domestic actors, which enables aggregation and comparability of development evidence, and avoid parallel monitoring mechanisms and cycles (GPEDC, 2014; GPEDC, 2018a). Out of 13 sub-indicators, national coordinators directly report four (1b, 5b, 7, and 8) and complement three (4, 9a, and 10) based on existing assessments, while the rest are collected after consultation with donor countries and/or domestic actors (GPEDC, 2018a). Collected data and information then will be reviewed in triangulation by the OECD-UNDP Joint Support Team, the headquarter focal points, and the national coordinators (ibid.).

The continual renovation of the GPEDC monitoring framework is also illustrated through the meaningful inclusion of domestic actors with specific roles assigned in the monitoring exercise (see Table 8). In particular, the role of CSOs and private enterprises and their contribution to development cooperation are increasingly recognized, as hundreds of them have been consulted throughout the monitoring process for two new indicators on inclusive partnership (Indicators 2 and 3) that were monitored for the first time in 2016 (GPEDC, 2016). These consultations helped revealing key gaps in partner governments' support for these actors' comprehensive and inclusive engagement in the development process (GPEDC, 2016; GPEDC, 2019). Another evidence of greater inclusion over time is the rise in the number and the diversity of participating countries in the monitoring process. While the number of participating countries nearly doubled between 2014 and 2018 (from 46 to 86 states), the latest monitoring round witnessed the voluntary engagement of least developed countries for the first time along the usual contributors such as low and middle-income countries (GPEDC, 2014; GPEDC, 2016; GPEDC, 2019).

Table 8. Overview of reporting roles by indicator in the GPEDC monitoring exercise

GLOBAL PARTNERSHIP INDICATORS	Who reports?				
	Govern-ments	Dev. Partners	Private Sector	CSOs	Global sources
1a: Development partners use country-led results frameworks	√	●			
1b: Countries strengthen their national results frameworks	●				
2: Civil society operates within an environment that maximises its engagement in and contribution to development	●	←		←	
3: Public-private dialogue promotes private sector engagement and its contribution to development	●		←		
4: Transparent information on development co-operation is publicly available	○				●
5a: Annual predictability of development co-operation	√	●			
5b: Medium-term predictability of development co-operation	●				
6: Development co-operation is on budget and subjected to parliamentary scrutiny	●	←			
7: Mutual accountability is strengthened through inclusive reviews	●	○			
8: Countries have systems to track and make public allocations for gender equality and women's empowerment	●				
9a: Quality of Country Systems	○				●
9b: Development partners use countries' own systems	√	●			
10: Aid is untied	○				●

This stakeholder ***responds*** to the indicator : ●
This stakeholder ***complements*** with additional inputs : ←
This stakeholder ***validates*** inputs from other stakeholder : √
This stakeholder ***can complement*** with inputs, as needed : ○

Source: GPEDC (2018a, p.18)

Currently, the GPEDC framework can be considered as the most closely linked development cooperation evaluation framework to the 2030 Agenda (Bhattacharya et al., 2021). In particular, the GPEDC has published several documents that conceptualize the connection between its monitoring framework and the SDGs, one of which is Global Partnership Monitoring Reform – Analytical Paper on Linkages to the 2030 Agenda released in 2021. The paper analyzes the linkages with the SDGs at three different levels: (i) indicator framework; (ii) global-level processes; and (iii) country-level processes (GPEDC, 2021).

Figure 5. SDGs-GPEDC indicator linkage

5 GENDER EQUALITY	SDG Indicator: 5.c.1. Proportion of countries with systems to track and make public allocations for gender equality and women's empowerment	GPEDC Indicator 8. Governments have systems to track public expenditure for gender equality and women's empowerment
17 PARTNERSHIPS FOR THE GOALS	SDG Indicator: 17.15.1. Extent of use of country-owned results frameworks and planning tools by providers of development cooperation	GPEDC Indicator 1a. Development partners use those national results frameworks to align, design and monitor the results of their development co-operation activities
17 PARTNERSHIPS FOR THE GOALS	Indicator: 17.16.1. Number of countries reporting progress in multi-stakeholder development effectiveness monitoring frameworks that support the achievement of the Sustainable Development Goals	All GPEDC Indicators

Source: GPEDC (2021, p.10) combined with author's analysis

Regarding the first linkage, the GPEDC monitoring exercise contributes to generating country-level data to two out of three SDG indicators (SDG Indicator 5.c.1 and 17.15.1) respectively from Indicators 8 and 1a within its monitoring framework (GPEDC, 2021). The third SDG Indicator – Indicator 17.16.1 – is not linked to the completion of a specific GPEDC indicator but a composite indicator that reflects the improvements in a majority of indicators reported by that country. All three GPEDC indicators are classified as Tier II in the SDG indicator tier system, meaning that their conceptualization is clear with "an internationally established methodology and standards, but data are not regularly produced" (ibid., p.9).

The second linkage is between the GPEDC monitoring rounds and the SDG follow-up and review. Leading this major linkage is the OECD-UNDP Joint Support Team that annually reports GPEDC monitoring data or nuanced storylines based on data disaggregation on SDG Indicators 17.15.1 and 17.16.1 to the UN Statistics Division. The GPEDC monitoring data, when included in the annual UN Secretary General's report on SDGs progress, will contribute to the United Nations High-level Political Forum on Sustainable Development (UN HLPF) – a central platform that guides the SDGs implementation (GPEDC, 2021). While the GPEDC monitoring exercise is conducted roughly every two years, the SDG reporting is executed annually. The GPEDC monitoring exercise's rigid timeframe, combined with the lack of flexibility in terms of its timing and duration, has been recommended to adjust the frequency of the exercise in response to concerns of partner countries.

The extent to which the GPEDC monitoring results is incorporated in country-level SDG reporting processes is considered as the third linkage. While the GPEDC monitoring framework endorses a country-led process for data collection and reporting, attempts have been made to nationalize the SDG monitoring and review process. The two frameworks are then linked by the Voluntary National Reviews (VNRs) – a national commitment set in the 2030 Agenda to implementing regular country-led and country-driven reviews of the SDG progress (GPEDC, 2021). As several partner countries planned to use the GPEDC monitoring results to consolidate their VNRs, the Joint Support Team also provides these countries with their latest GPEDC monitoring results.

From a broader perspective, the three seemingly concrete linkages have allowed the GPEDC to enhance SDGs implementation in different ways. As a multistakeholder platform for monitoring and evaluating development cooperation, the GPEDC and its monitoring framework facilitate comprehensive and inclusive mutual learning that aims to involve non-state actors and encompass SSC and TDC to enable the achievement of the SDGs as a whole (GPEDC, 2016). The close monitoring of the publication of information on development cooperation resources and activities through national and international systems also feeds into the mutual learning process (ibid.). Additionally, the identification of key challenges facing developing countries that have slowed down the process of localizing the 2030 Agenda such as the costs of adopting SDG indicators and the degree of coordination between partner countries and their development partners is also a reference point for improving the country-led results-based management (GPEDC, 2019).

However, the utmost impacts of the GPEDC monitoring framework can only be realized if the technical and political concerns surrounding it, either emerging or inherited from the Paris Declaration monitoring exercise, can be explicitly acknowledged and thoroughly addressed.

On the political aspects, first and foremost, the continuation of the voluntary participation in the monitoring rounds as in the previous SMPD attracted critics on a potential distortion of the monitoring results in case countries with poor performance refuse to be on board (CONCORD, 2012). Even for DAC donors, the Busan Partnership Agreement seems to be a set of 'pick and choose' commitments, as (i) not all the commitments set in Busan are included and monitored in the GPEDC monitoring framework and (ii) countries can select indicators to monitor (GPEDC, 2014), raising the concern about selective implementation (CONCORD, 2012). In fact, evidence on the asymmetrical implementation of the GPEDC monitoring exercise was found where partner countries strived even harder to fulfil their commitments than their development partners (GPEDC, 2016). Another issue with the participatory nature of the GPEDC monitoring framework is that the multistakeholder validation of collected data and information can be overridden by political capture during the consensus-building processes (CONCORD, 2012).

Furthermore, the Busan Partnership Agreement's lack of legitimacy among providers in the Global South consequently led to the uneven North-South endorsement of the set commitments, as well as the exclusion of a considerable fraction of development cooperation activities from the GPEDC monitoring rounds. In fact, the follow-up documents after Busan explicitly stated that Southern providers are not expected to endorse either the Busan agreement or the GPEDC monitoring exercise in face of the reluctance of major new providers to conforming with the new development effectiveness agenda (Esteves & Klingebiel, 2021). Moreover, the GPEDC's heavy focus on monitoring bilateral development cooperation rather than paying extensive attention to TDC as pledged is another attribute to the insufficient representation of NSSC in the monitoring results (GPEDC, 2016). That has overlooked and undermined the obstacles to development effectiveness posed by the North-South divide and the increasing fragmentation in the aid architecture (CONCORD, 2012).

On the technical aspects, the lack of clear targets and specific timeframe, particularly for politically sensitive indicators, has been a major criticism against the GPEDC monitoring framework. For example, neither targets nor timelines have been established for Indicator 10 on untying aid despite the call from both the Paris Declaration and the Busan Partnership Agreement (GPEDC, 2016), as well as the recommendations by the OECD-UNDP Joint Support Team (GPEDC, 2017). That has highlighted the reluctance of DAC donors to drive an agenda for untied aid in exchange for improved development effectiveness. The absence of clear targets and timeframe can also be found in Indicator 2 on CSOs engagement, Indicator 3 on public-private dialogues, and Indicator 4 on transparent information, while Indicator 1 on national results frameworks, Indicator 7 on mutual accountability, and Indicator 8 on public expenditure tracking do not have specific timelines.

Despite a synthesis of initiatives, success stories, and overall recommendations towards enhancing development cooperation extracted from the monitoring rounds, the GPEDC monitoring framework still failed to provide sufficient, impactful interpretation of the monitoring results for all actors and critical analysis of donor performance (Mitchell, 2021). When combined with the lack of respective international and national feedback loops, these gaps embody a missed opportunity for these monitoring results to track the Busan commitments, to facilitate subsequent decision-making processes, or to drive further political debates on development cooperation (Besharati, 2013).

The Center for Global Development (CGD)'s Quality of Official Development Assistance Assessment (QuODA)

The QuODA index can be considered as one of the most frequently updated and systematically monitored sets of indicators of independent evaluations for aid effectiveness and consequently development effectiveness. Birdsall et al. (2010) published methodology and results the QuODA index for the first time in 2010, which originally consisted of thirty indicators divided into four dimensions of aid effectiveness with close alignment with the Paris Declaration principles: (i) maximizing efficiency; (ii) fostering institutions; (iii) reducing burden; and (iv) transparency and learning. The selection of indicators was justified with three different explanations, one of which was based on the suggestions from existing literature (e.g. untied aid), the second one was considered as proxies to improved aid effectiveness (e.g. accountability of aid agencies), and the last one was linked to empirical academic results (e.g. aid allocation to poor nations) (ibid.).

Derived mainly from the OECD DAC's data channels, the focus of the QuODA index has always been on DAC members and DAC reporting providers. The major sources of data used for the QuODA index includes the OEDC's CRS, Peer Reviews and CPA data, the GPEDC monitoring results, Multilateral Organization Performance Assessment Network (MOPAN) assessments, International Aid Transparency Initiative (IATI) data, World Development Indicators, and World Governance Indicators (Mitchell et al., 2021).

To better reflect the fundamentally changing aid architecture, the QuODA index has undergone constant updates every 2-4 years since 2010. However, despite the paradigm shift from aid effectiveness to development effectiveness in 2011, it was not until 2018 that the QuODA index was adjusted in line with the Busan Partnership Agreement. Although the previous four dimensions remained, the number of indicators in the new version of the QuODA index dropped to twenty four (McKee & Mitchell, 2018). The changes were made with seven indicators removed mainly due to the cease in data collected from the SMPD, while the data source for most of another eight indicators was directed to the GPEDC surveys (ibid.). What is important to mention is that such a high frequency of removal of indicators or adjustment in data collection, though proves high level of adaptation, hinders the comparability of the QuODA indicators overtime (ibid.).

A more fundamental change to the measuring framework of the QuODA index took place again in 2021. Focusing still on donors' performance and commitments, the 2021 QuODA edition put together seventeen indicators with four new dimensions: (i) prioritization; (ii) ownership; (iii) transparency and untying; and (iv) evaluation (Mitchell et al., 2021) (see Table 9).

Table 9. The QuODA 2021 dimensions and indicators

Indicators	What is measured?
Prioritization – the degree to which allocations are targeted to best respond to need and long-term development challenges	
P1: Aid spent in partner countries	The share of ODA that is transferred or programmable in partner countries through an adjusted version of CPA called aCPA
P2: Poverty focus	The extent to which development cooperation is allocated towards the poorest countries
P3: Contributions to under-aided countries	The extent to which each provider moves the global distribution of CPA towards or away from an optimal allocation
P4: Core support to multilaterals	The share of total gross ODA disbursements channelled as core support to multilateral agencies
P5: Supporting fragile states and global public goods	ODA contributions to support engagement in fragile states and as GPGs as the average of z-scores on two sub-indicators: P5a. Fragility-weighted allocations P5b. Share of ODA supporting global public goods
Ownership – the degree to which providers work with and through partner countries to promote domestic ownership and use of national systems	
O1: Alignment at objectives level	Alignment of providers activities with partner frameworks as the average of the zscores of two sub-indicators: O1a. Share of development interventions using objectives from partner country frameworks O1b. Share of evaluations planned with partner countries
O2: Use of country financial systems	Providers' use of partner country financial management systems as the average of the z-scores of two sub-indicators: O2a. Share of ODA recorded in partner country budgets O2b. Use of partner country public financial management systems
O3: Reliability and predictability	Predictability and reliability of ODA as the average of the z-score of two sub-indicators: O3a. Share of scheduled ODA recorded as received by partner countries: the short-term predictability of ODA commitments (within a 12-month period) O3b. Coverage of forward spending plans: the estimated proportion of development cooperation covered by indicative forward expenditure and/or implementation plans for one, two, and three years ahead

O3: Reliability and predictability	Predictability and reliability of ODA as the average of the z-score of two sub-indicators: O3a. Share of scheduled ODA recorded as received by partner countries: the short-term predictability of ODA commitments (within a 12-month period) O3b. Coverage of forward spending plans: the estimated proportion of development cooperation covered by indicative forward expenditure and/or implementation plans for one, two, and three years ahead
O4: Partner feedback	The share of CPA allocated to countries that respond to the GPEDC for each provider and response rates based on the share of CPA received by respondents
Transparency & Untying – the degree to which providers publish information on ODA activities in a timely and comprehensive way	
T1: Aid reported in IATI	The coverage of provider reporting to IATI relative to ODA and other official flows reported to the CRS, to identify the proportion of disbursed flows that are published to the IATI standard
T2: Comprehensiveness of data (CRS)	Coverage and comprehensiveness of DAC provider reporting to the CRS as the average of the z-scores of three sub-indicators: T2a. CRS Comprehensiveness - Recording of Project Titles & Descriptions: the percentage of each of the three fields title, short description, and long description that was completed for each ODA activity T2b. CRS Comprehensiveness - Detail of Long Descriptions: the natural logarithm of the average character count in the long description fields T2c. CRS Comprehensiveness – Reporting of ODA Delivery Channel: the share of projects by provider for which a specific channel name was reported to the CRS, weighted by the financial size of projects
T3: Timeliness (IATI and CRS)	The timeliness of reporting to the CRS, and the timeliness and frequency of reporting to the IATI as the average of the z-scores of two sub-indicators: T3a. CRS Timeliness: a three-point scale T3b. IATI Timeliness and Frequency: a scale of 0-4
T4: Untied aid (official)	The share of total ODA that is untied for each provider based on the tying status of ODA in the OEDC's CRS
T5: Untied aid (contracts)	The share of contract value awarded by each provider to domestic companies beyond the share of total global contracts awarded to the provider
Evaluation – the quality of providers' learning and evaluation systems. The aim is to identify systems and practices that are designed both to capture evidence from development programming and to use this data to inform future decision-making	
E1: Evaluation systems	A composite measure of the quality of evaluation systems, calculated by averaging provider scores on four sub-indicators: 1. Policy: Evaluation policy with defined roles and responsibilities 2. Plan and budget: Dedicated evaluation plan and budget to allow consistent coverage of activities 3. Independence: Evaluation function is independent and impartial 4. Expertise: Sufficient expertise and systems in place to ensure quality
E2: Institutional learning systems	A composite measure of the quality of learning systems, calculated by averaging provider scores on three sub-indicators: 1. Accountability: Program management and accountability systems ensure follow-up on recommendations and learning 2. Knowledge management: A knowledge management system based on results and evidence is used and there is uptake of lessons and best practices 3. Improvement: The provider has implemented past recommendations/made progress in areas identified in the previous assessment

E3: Results-based management systems	A composite measure of the quality of results-based management systems, calculated by averaging provider scores on two sub-indicators: 1. Results-oriented policies and strategies: Expected results are clearly and systematically identified, based on a sound logic. 2. Use of results information: Results management and monitoring systems provide high-quality information that is used for planning, decision-making, program management, and learning.

Source: Author's synthesis based on Mitchell et al. (2021)

Within a set of indicators seemingly aligned with the GPEDC framework, the 2021 QuODA index manages to include novel indicators that look directly at the often-neglected issues surrounding the provision of ODA and aid effectiveness evaluation. First, Indicator P1 aims to capture the share of the actual transfers of aid that directly support development projects in the recipient countries in total bilateral ODA for each donor (Mitchell et al., 2021). Although this indicator is measured based on the DAC's CPA concept, the CGD has developed aCPA – an adjusted version of the CPA – by subtracting aid spent on research undertaken within donor countries from the total CPA reported by the OECD, and counting cross-border flows such as humanitarian and food aid into the recipients (ibid.). It should be noted that the CPA, though essential to long-term development of the recipients as discussed in Chapter 1 of this paper, was not included in the GPEDC monitoring framework and its in/exclusion hence highlights a key difference between a deemed DAC-driven agenda like the GPEDC and an independent evaluation like the QuODA index. Second, recognizing that the GPEDC monitoring exercise's voluntary nature leads to inconsistent response rates among recipients that can distort the monitoring results, Indicator O4 measures response rates based on the share of CPA allocated to the recipients responding to the GPEDC surveys (ibid.). Differences in the recipient countries' size and the scale of their engagement with providers are taken into account (ibid.).

A key limitation of the QuODA index inherited from the use of OEDC's data is that this index also leaves out the growing contribution of SSC and TDC to development effectiveness. There is also apparently no direct link between the results found in the QuODA index with the implementation of the 2030 Agenda. Except for Indicator P2 on allocations to poor nations and Indicator P5 on funding for global public goods, there are no other QuODA indicators that capture the cross-cutting issues in development cooperation such as climate change and gender inequality. Another important criticism of the index is that the credit given to aid allocated to poor yet well-governed nations contradicts with the call for greater aid to fragile states (Indicator P5) (Mitchell, 2021). The prioritization of aid to fragile states is also ultimately in tension with Indicators O1 and O2, in which the emphasis of the alignment with and utilization of recipient country systems and frameworks that may be weaker in fragile states poses a conceptual challenge (ibid.).

The Overseas Development Institute (ODI)'s Principled Aid Index

Since its creation in 2019, the Principled Aid (PA) Index has monitored aid allocation among DAC donors to distinguish long-term gains derived from tackling global development challenges from short-term unilateral benefits obtained from purely commercial contracts or geopolitical allies (Gulrajani & Silcock, 2020a). Going through a recent reform in 2020, the PA Index now consists of fifteen indicators equally divided into three dimensions of principled aid: (i) development gaps; (ii) global cooperation; and (iii) public spiritedness (Gulrajani & Silcock, 2020b) (see Table 10). The three criteria used to select the indicators for the PA Index are conceptual clarity which is the connection between the indicator and the overall concept derived from existing literature, data availability which refers to the availability of high-quality and sufficient data on DAC donors between 2013 and 2018, and correlations which depicts the positive correlation of indicators under each dimension (ibid.). The main data sources for the PA Index include the OECD's CRS, the World Bank Development Indicators, and UN agencies. The selected indicators are aggregated to produce an annual PA Score for each provider, which enables the comparison among donor allocations (ibid.).

Table 10. The Principled Aid Index principles and indicators

Principle	Indicator
Development gaps Aid is allocated to countries and themes that reduce vulnerabilities and inequalities, which can advance prospects for security, stability and prosperity everywhere	1A. Targeting poverty: aid flows weighted by the poverty rate (poverty headcount ratio) in recipient countries.
	1B. Supporting displaced populations: amount of bilateral ODA to countries that cumulatively host 70% of cross-border forcibly displaced populations, as a share of bilateral ODA.
	1C. Assisting conflict-affected states: amount of humanitarian bilateral ODA to countries with active violent conflicts, as a share of bilateral ODA.
	1D. Targeting gender inequality: amount of gender-focused bilateral ODA, as a share of total bilateral ODA.
	1E. Global safety net: share of ODA on health, education and social security that is spent in Severely Financially Challenged Countries (SFCCs).

Global cooperation Aid is allocated to global challenges requiring collective action and multilateral institutions that facilitate cooperation	2A. Enhancing global trade prospects: amount of bilateral ODA allocated to aid-for-trade activities, as a share of total bilateral ODA.
	2B. Providing core support for the multilateral system: amount of ODA as core multilateral funding (minus core funding to EU institutions), as a share of total ODA.
	2C. Tackling the effects of climate change: three-year rolling average amount of total ODA (bilateral and imputed multilateral) for climate mitigation and adaptation activities, as a share of total ODA.
	2D. Reducing the spread of communicable disease: amount of ODA (bilateral and imputed multilateral) allocated to slow the spread of communicable diseases, as a share of total ODA.
	2E. Brokering peace: spending on peace and security (bilateral and imputed multilateral), as a share of total ODA.
Public spiritedness Aid is not allocated towards activities that advance narrow, short-term interests that have limited positive spillover effects for other nations	3A. Minimising tied aid: share of bilateral ODA that is formally or informally tied.
	3B. Reducing alignment between aid spending and United Nations voting: correlation between UN voting agreement across donors and recipients, and bilateral ODA disbursements from donors to recipients.
	3C. De-linking aid spending from arms exports: correlation of dyadic bilateral ODA flows, per recipient capita, and arms exports between donors and recipients, per recipient capita.
	3D. Localising aid: share of bilateral ODA spent as Country-Programmable Aid (CPA), plus share of bilateral ODA spent in Country-Based Pooled Funds (CBPFs).
	3E. Influencing elections: absolute value of the difference between expected and actual ODA flowing to a recipient during an election year.

Source: Gulrajani & Silcock (2020b, p.8)

Compared to the QuODA index, the PA Index performances relatively better in connecting aid allocation with the achievement of the SDGs. In particular, the PA Index highlights the crucial role of ODA allocation in addressing shared development challenges in poverty, healthcare, education, security, gender inequality, and climate change in one thirds of its indicators (1A, 1D, 1E, 2C, 2D and 2E), possibly aligning the results from the index with SDGs 1, 3, 4, 5, 13, and 16. Additionally, the PA Index dedicates one separate indicator (2A) for the promotion of aid-for-trade activities, recognizing global trade as an engine for promoting growth in developing countries while enhancing the effectiveness and impacts of development cooperation for both donors and recipients (Gulrajani & Silcock, 2020b). Another unique indicator that reflects the PA Index's intention in challenging the status quo of ODA provision is Indicator 3B that aims to diminish the relation between aid spending and voting power at the UN (ibid.). By including this indicator and publishing its findings, the PA Index may contribute to addressing the donor-recipient asymmetries in aid provision, as data from the index can be used to initiate political debates. Last but not least, Indicator 3D on localizing aid, similar to that in the QuODA index, gives weighs to the share of bilateral ODA spent as CPA, excluding non-cross-border flows, combined with the share of aid spent as part of the Country-Based Pooled Funds (CBPFs) – multi-donor financing instruments monitored by the United Nations Office for the Coordination of Humanitarian Affairs (UN OCHA) (ibid.).

Nevertheless, the PA Index at the end remains “a supply-side exercise that does not examine the quality or impact of aid delivered in the national interest, or recipient preferences with regard to the aid provided” (Gulrajani & Silcock, 2020a, p.15). Another limitation of the index is that certain donors gain more from some indicators than others while no subjective weights to scores are applied to account for regional or national differences (ibid.). Last but not least, the index is also faced with the similar criticism on suggesting the greater allocation of ODA to fragile states as in the QuODA index (ibid.).

Chapter 4. Conclusion and recommendations

Up to date, the GPEDC monitoring framework has proven its leading position in providing a unique platform to specifically evaluate the effectiveness of development cooperation. Compared to the QuODA index and the PA Index, the GPEDC indicators are more advanced in terms of principle and indicator connectedness, methodology sophistication and complexity, and global coverage – overall making them the currently best fit to evaluate development cooperation. Despite its relatively comprehensive and inclusive coverage of the multidimensions of development cooperation, several key recommendations regarding the technical and political aspects should be thoroughly analyzed and considered to improve the overall effectiveness and efficiency, legitimacy, and impacts the upcoming monitoring rounds. These recommendations are derived from the existing literature and best practices from other indexes.

I. Recommendations on evaluation indicators

1. Contribution to Global Public Goods Provision:

The implementation of a number of SDGs**,** notably SDG 2 on global health challenges and SDG 13 on climate actions, requires a set of GPGs to be effectively delivered through a functional international cooperation regime, encompassing novel forms of collaboration that are beyond current aid practices (Furness et al., 2013; Schönwälder, 2013; Chaturvedi et al., 2021). That has underlined the ongoing debates on the role of ODA as the main source of funding for the SDGs in providing GPGs (Janus et al., 2015).

Global public goods (GPGs) can be defined as "goods whose benefits or costs are of nearly universal reach or potentially affecting anyone anywhere" (Kaul et al., 2013, p.10). Domains of GPDGs can include basic human rights, peace and security, communicable disease control, and global climate stability (ibid.). GPGs' publicness in consumption (i.e. goods that are globally public in consumption), however, should not be mixed with publicness in utility, as the preferences for GPGs vary widely for countries and people. These are two separate of the four dimensions of publicness that need to be matched for the effective provision of GPGs (Kaul, 2017). GPGs are also public in provision, the third publicness dimension, which means that they are the products of a 'summation process' of policy actions undertaken in many countries in the forms of cross-border spillover effects management or globally coordinated provision of national public goods (Kaul et al., 2013). This dimension also implies that any adjustments in the level of provision of a GPG must be taken in cooperation with other nations rather than in silos at the national level, which is closely connected with the last publicness dimension – publicness in decision-making toward the mobilization of technical and financial efforts for GPGs provision at the international level (ibid.).

The major obstacle in the provision of GPGs is that being "non-rivalrous (one person's use of or participation in them does not limit another person's) and non-excludable (no one can be prevented from using or participating in them)" often causes them to be domestically underfunded (McKee et al., 2020, p.33). Therefore, the extent to which ODA spending is supporting GPGs is a crucial attribute to development effectiveness under the 2030 Agenda's framework. Funding for GPGs should be distributed in parallel with that for country-level poverty reduction rather than being combined under the same ODA spending, as GPGs are now also a widely acknowledged legitimate objective for aid allocation considering their intrinsic linkages to development challenges disproportionately impacting poor and vulnerable populations in developing countries (ibid.).

However, the use of foreign aid to fund GPGs might not achieve expected results in the presence of mixed yet better separated collective interests and self interests. On the one hand, generating and funding these goods are difficult when "states too are influenced by incentives to refrain from being involved in the provision of public goods (tragedy of the commons)" (Ashoff & Klingebiel, 2014, p.21). On the other hand, the provision of GPGs can be overridden by the donors' self interests, leading to the recipients' development priorities being subordinate to those of the donors (ibid.). The increase use of ODA for GPGs provision carries the inherent risk of crowding out the original focus of development assistance on individual countries' needs (Ashoff & Klingebiel, 2014; Kaul, 2017).

Recommendation:

This paper hence suggests that ***a sperate indicator measuring the percentage of aid allocated for GPGs and number of countries that have public expenditure tracking system for GPGs*** can be created under the principle ***Focus on results*** in the GPEDC monitoring framework. The measuring methodology can be referred from Indicator P5b in the QuODA index, while the specific spending on gender equality and climate actions among other GPG domains can be added in as sub-indicators which can be based on the measuring methodology of the PA Index for Indicators 1B, 1C, 1D, 1E, 2C, 2D, and 2E. GPEDC Indicator 8 on tracking budget for gender quality and women's empowerment should also be modified to become a sub-indicator under this new indicator.

2. Aid Localization:

The issues surrounding the huge discrepancies between net CPA and net ODA have already been raised in Chapter 1 of this paper. The 2005 Real Aid Report by ActionAid distinguishingly discounted 'phantom aid' to capture real aid, revealing shocking numbers such as over 60% of aid flows did not represent an actual transfer to the recipient and two thirds of aid money was not genuinely dedicated to poverty reduction in developing nation (Action Aid, 2005). What is even more worrisome was that the level of phantom transfers reached up to 89% for the worst G7, and at the same time also DAC, donors (ibid.). Some of the key characteristics of phantom aid include ineffective and overpriced technical assistance; failing to target poverty reduction; tied to goods and services provided by donors; and spending on excessive administration costs (ibid.). The European non-governmental organization (NGO) confederation CONCORD (2012) uses 'dead aid' as another term to refer to the enormous amount of ineffective OECD DAC's ODA transferred to developing countries, pointing also to the high administration costs in the Northern capitals as one of the key reasons.

Roodman (2014) points out that the current aid accounting system allows the inclusion of aid spent within donor countries in foreign assistance. When assumed that the pool of resources for ODA is fixed for every donor, the in-recipient spending for developmental programming is potentially traded off with greater in-donor spending (Gulrajani & Silcock, 2020b). As donors can generate more significant development impacts by advancing the proportion of assistance allocated to the recipients' development projects (Mitchell et al., 2021), the concept of CPA should be closely monitored and measured.

Recommendation:

This paper advocates for the addition of ***a separate indicator measuring the percentage of aid allocated to development programs and projects*** under the principle ***Ownership*** in the GPEDC monitoring framework. This new indicator can be based on the already monitored OECD DAC's CPA data combined with CPA data shared by Southern providers, CPA data derived from TDC projects (if not already included in OECD DAC's CPA data), and data on CBPFs generated by UN

OCHA in order to portray the current state of aid spending more precisely and comprehensively. The approach to combining the two data sources of OECD DAC's CPA data and UN OCHA's CBPFs data can be based on the methodology built for Indicator 3D in the PA Index. Furthermore, this indicator can also refer QuODA Indicator P1 for a refined methodology of calculating CPA.

3. Non-conditionality and Untied Aid:

The 2017 revision of the GPEDC monitoring framework identified the reflection of the approaches to assess the contribution of Southern providers to development cooperation as a priority for the next monitoring rounds. The specific recommendation was to establish a specialized policy dialogue engaging relevant Southern actors to explore how effectiveness dimensions of SSC as determined by Southern providers, beneficiary countries and other stakeholders can be reflected (GPEDC, 2017). However, the 2018 monitoring round still failed to adjust some of the DAC-relevant-only indicators to fully embrace the CBDR principle in measuring development effectiveness, one of which is GPEDC Indicator 10 on untying aid, whereas conditionalities in aid provision is a more relevant concern within development cooperation activities that involve Southern providers.

Recommendation:

This paper supports ***the extension of GPEDC Indicator 10*** under the principle ***Ownership*** to ***include a sub-indicator measuring the percentage of aid provided without strict conditionalities*** (CONCORD, 2012). Under SSC, strict conditionalities are negatively viewed as a counterfactor to empowerment of the beneficiary countries, as they are against the principles of sovereignty respect and noninterference (Besharati et al., 2017). The design of this sub-indicator can be derived from the NeST indicator on non-conditionality that looks at whether development programs and projects are mutually built and whether any policy conditionalities are imposed on development initiatives.

Moreover, in line with the 2017 revision of the GPEDC monitoring framework, this paper recommends that GPEDC Indicator 10 on untying aid and possibly on non-conditionality if adjusted should include specific targets and timeframes that allows meaningful tracking of the commitments made. While the timeline can be in accordance with the 2030 Agenda, the targets must be updated based on the current situation of donors' foreign aid policies and the context of beneficiary states' development processes.

4. Capacity Building:

Realizing the importance of capacity building elements of development cooperation in the long-term development of beneficiary states, the inclusion of an indicator to measure the extent to which the provision of technical assistance to developing countries can ensure genuine capacity building has been proposed since the introduction of the GPEDC monitoring framework (CONCORD, 2012). Human and institutional capacity building has been widely used as an integral part in SSC to encourage the reduction of external dependency through a stable increase in local capacity while assisting the recipients in raising domestical sources for financing long-term in-country development processes (Besharati et al., 2017).

Recommendation:

This paper is in line with the previous proposals that ***a new indicator measuring the extent to which capacity initiatives and activities are being conducted as part development cooperation***, which can be included under the principle ***Ownership*** in the GPEDC monitoring framework. The NeST indicator on capacity building can be used as a reference point where different aspects of capacity building are quantified and evidence on knowledge application and behavioral changes is collected (Besharati et al., 2017). This new indicator is also closely linked to the spirit of NSSC interventions, in which the comparative advantages in expertise and experience of the donor country and the pivotal states are maximized for building the capacity for the beneficiary countries.

II. Recommendations on evaluation institution

The North-South tensions resulting from the OECD DAC's attempts to forcefully impose its evaluation principles and monitoring framework on Southern providers are expected to persist. On the other hand, the dual role of most emerging countries in the Global South as providers and aid-receivers remains a core reason why they also appreciate the commitments of the Paris Declaration and the Busan Partnership Agreement (UNECOSOC, 2008a). Therefore, the actual obstacle between Southern providers and their participation in the GPEDC monitoring exercise is which institution has the political legitimacy of an international development cooperation regime particularly in Southern providers' perspective.

Since the 4th HLF in Busan, suggestions that the UN DCF can serve as a more legitimate and inclusive platform hosting development cooperation discussions (Kindornay, 2011; Kindornay, 2013; Besharati, 2013). The legitimacy of the UN DCF as an international development cooperation regime is mainly attributed to the UN's universal membership framework that covers 193 member states in contrast to the restricted partnership within the OECD that is primarily associated with DAC members (Chaturvedi et al., 2021). Launched in 2007 as a sub-organ of the United Nations Economic and Social Council (UNECOSOC) to oversee member states' progress in implementing international development commitments, the UN DCF holds biennial consultation sessions with the development community that facilitate multi-stakeholder communication, knowledge sharing and mutual learning (UNECOSOC, Undated). The UN DCF's analytical work is also taken into account at the UN HLPF in the process of the 2030 Agenda's follow-up and review (ibid.).

After Busan, in fact, Southern providers have taken bold steps to increase the legitimacy of the UN DCF as a forum welcomed by the Global South. India took the lead in that process through its sponsorship and organization of the Delhi Conference on Southern Providers in 2013, bringing together all major SSC partners and high-level political figures from the UN to strengthen collaboration and expertise for SSC evaluation (Besharati, 2013). It is worth noticing that the conference emphasized the need for more platforms where Southern providers and beneficiaries can coordinate on mutual issues to establish common positions and exercise proactive roles in the broader global fora with the participation of traditional donors, including the Busan Partnership Agreement (ibid.). The influence of the conference was proven through the creation of the political forum of the Core Group of Southern Providers within the UN DCF (Besharatiet al., 2015). The fact that Southern providers also recognize the potential of UNECOSOC – UN DCF's managing agency – as one of the potential management systems to host SSC data further enhances UN DCF's legitimacy in the Global South (ibid.).

However, there has been a considerable degree of skepticism regarding the capacity of the UN in general and the UN DCF in particular for their historical inefficiencies, stemming from the massive UN bureaucracy that supposedly slows down its operation and is unavoidably susceptible from the influence of contradicting political forces (Besharati, 2013). Consequently, consensus on future actions is often notoriously difficult to reach considering the considerable number and diversity of stakeholders, which may result in a decrease in the political interest in the UN DCF deeming it to be a mere 'talk shops' (ibid.). That is the major reason why the UN DCF has accomplished extraordinarily little since its creation with the limited financial and political support for its operation from developing countries, whereas high-income nations generally and historically discredit the UN (Mello e Souza, 2021).

To ensure the UN DCF's legitimacy to both major donors in the North and new providers in the South, it is crucial that the UN DCF begins to accelerate concrete actions to integrate SSC evaluation principles and framework into the GPEDC monitoring framework. The true endorsement of the CBDR principle is a good start. The UN DCF must become the platform to host constructive dialogues that engage Southern partners to reach consensus on what counted as SSC or definition of SSC in monetary terms. Such a consensus will be the basis for a whole new customized narrative to underpin the differential commitments – a narrative that desperately needs the UN DCF's facilitation to be formed and disseminated. The second equally important topic to be discussed at these dialogues is a Southern definition of which and whether any of the Busan commitments and eventually GPEDC indicators are relevant to SSC and TDC. Furthermore, new providers need to be able to suggest alternative definitions and measures reflecting their own circumstances to any irrelevant commitments and indicators (Bracho, 2021). In these dialogues, Northern partners should serve the role of observers, closely taking note of the South's proposals and demands for adjustment in the GPEDC monitoring framework. Any adjustments that can be considered and undertaken will be strong evidence of the recognition of Southern providers' values, specificities, and significance, which encourages new providers can exercise their ownership over the framework while enabling them to report development cooperation in a transparent and consistent way (UNECOSOC, 2008a).

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