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## Investing in international security: rising powers and organizational choices

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**Abstract** *How do rising powers choose to allocate their finite resources among the multiple global and regional security organizations? Building on the literatures on forum shopping and rising powers, we argue that the different organizational investment choices of rising powers are explained by varying regional ideational affinities. Organizational settings have ideational foundations that can look very different from region to region. We argue that regional ideational affinity leads rising powers to invest in regional rather than global organizations. However, if the ideational composition of the region is highly diverse, global organizations are a better vehicle to accommodate rising powers' emergent ambitions. To demonstrate our argument, we examine the choices of Brazil and South Africa in terms of their material and ideational investments in regional and global organizations.*

### Introduction

Creating and maintaining international peace and security is an undeniable socially valued objective. Contributing to this objective not only stabilizes relations between and within states, but also provides states with the possibility to improve their international standing. By helping to create and maintain international peace and security, states show that they are willing and able to take on international responsibilities. Over the past 20 years, the number and depth of regional organizations that contribute to international security have grown significantly. Examples include the European Union (EU)'s Common Security and Defense Policy, the Gulf Cooperation Council and the Southern African Development Community (SADC). At the same time, the United Nations (UN) has become a more active crisis manager (Bellamy and Williams 2005). The proliferation of regional security organizations in the shadow of the UN has increased states' choices of where to exchange information and best practices, train police and troops, and put national soldiers under multinational command structures. With each security activity that a state undertakes in an international organization (IO), it decides how to allocate its finite and scarce resources, reducing the value that it can invest in other organizations with similar mandates.

Rising powers, which, by definition, are states whose material capacities are growing regionally and globally, are not immune to the choice between investing predominantly in regional or global IOs (Nolte 2010, 889).<sup>1</sup> Given their position at the intersection of regional and global politics, they have to manage global and regional pressures. These pressures are particularly visible for countries like Brazil and South Africa, which, unlike China and Russia, do not occupy a permanent seat on the UN Security Council and, unlike India,<sup>2</sup> are members of several regional organizations in addition to the UN (Jetschke and Lenz 2013, 631). How do rising powers choose to allocate their ideational and material resources among global and regional security organizations?

Building on the literatures on forum shopping (Busch 2007; Alter and Meunier 2009) and rising powers (Gray and Murphy 2014; Gaskarth 2015), we argue that the rising powers' different organizational investment choices between global and regional organizations can be explained by the degree of ideational affinity within their regions. If we observe regional ideational affinities, then we expect that rising powers will institutionally invest more in regional organizations than in the UN. However, if there is significant ideational discord between regional states, we argue that it is likely that rising powers will not find regional organizations that accommodate their power and that rising powers will therefore choose to improve their standing by giving priority to the allocation of institutional resources to global organizations. Ideational affinity manifests itself through the interpretations of the values *sovereignty* and *political community*.

To demonstrate how rising powers prioritize the allocation of their resources in the face of different organizational venues, we provide cross-case comparisons across two regions with variegated ideational differences: the Americas and Africa. While the threats and risks vary across these two regions, their regional organizational set-up reflects the variance in regional needs. That is, the African Union (AU) and subregional organizations such as SADC are set up to intervene militarily, while organizations such as the Organization of American States (OAS) and Union of South American Nations (UNASUR) focus more on mediation capacities and electoral assistance. The UN, on the other hand, is equipped to tackle the comprehensive set of threats to international peace and security. Consequently, there are regional and global options available to both Brazil and South Africa when pushing for a peace and security agenda. It is the choice between the different organizations and not the nature of the threat that we compare in this paper.

In the Americas, we observe a low degree of ideational affinity across the region with regard to the interpretation and linking-up of the values *political community* and *national sovereignty*. States stress *different political communities* as their main reference point (for example, Bolivarian solidarity, South America, Latin America, North America, national community) and value national sovereignty in terms of either *non-interventionism* or *transnational solidarity*. In particular, the US, Brazil and Venezuela (since 1999) diverge from each other. These multiple and competing ideational foundations constrain Brazil in building and managing its regional

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<sup>1</sup> The bulk of the international relations literature on rising powers understands an increase in material capabilities as a sufficient motivation for the adoption of a more ambitious international foreign policy (Gilpin 1981). We show that rising powers' adaptation to these new conditions is calibrated and nuanced.

<sup>2</sup> India's choice to join the Shanghai Cooperation Organization in 2016 will add an additional institutional layer to Indian foreign and security policy.

power base in the OAS or UNASUR. Hence, Brazil predominantly invests in the UN for international peace and security policy as the UN allows Brazil to circumvent regional ideational diversity.

In Africa, on the other hand, we observe relative ideational affinity around the value interpretations of political community and national sovereignty. African states, at least in their rhetoric, if not also in their practice, interpret political community as being both *national* and *Pan-African*. They agree that *sovereignty* can be infringed in specific circumstances such as *coups d'état*, war crimes or crimes against humanity. This ideational affinity provides South Africa with a fertile ground to push for its standing primarily through regional organizations. Consequently, we can observe that South Africa prefers African organizations to the UN to maintain international peace and security, and it invests in regional organizations as its primary vehicle for increasing its international standing.

Focusing on rising powers' preferences when it comes to institutional investment in their complex institutional environment improves our theoretical and empirical understanding of governments' priorities regarding regional and global organizations as well as the preferences of rising powers. This paper contributes to the literature on rising powers, which has so far predominantly focused on defining the concept of a "rising power" (Gray and Murphy 2014; Gaskarth 2015). Scarce attention has been given to the complex organizational environment in which these states act. Second, we provide additional empirical evidence that states conduct forum shopping, though not only for cost-effective reasons but also motivated by ideational opportunities and constraints. Third, we show that regions vary in their ideational compositions and regional cohesion. Our argument is not one of absolutes but speaks in relative terms. And, fourth, by focusing on Brazil and South Africa's international security policy, we contribute to redressing an empirical bias. Scholars working on issues of forum shopping have mainly focused on international trade and environment and have hardly paid attention to power disparities (Busch 2007). The empirical literature on security organizations has predominantly focused on Europe and the transatlantic relationship with North Atlantic Treaty Organization (NATO) as the primary empirical laboratory for studying the global hegemon's politics within its institutional environment.

We build our analysis on interviews conducted at the OAS and AU, General Assembly committee minutes, UN Security Council Resolutions, Brazilian and South African representatives' speeches, and secondary literature. We first address the existing theoretical gap and present our argument. In a second step, we apply this theoretical framework to the cases of Brazil and South Africa. We conclude with some implications for further research.

## **The argument**

This paper focuses on understanding the opportunities and constraints that lead rising powers to choose between different international (global and regional) organizations to improve their international standing by taking responsibilities that go beyond their national borders. Because rising powers' material capabilities are increasing, justifying the adjective "rising", they are theoretically more and more able to provide international public goods such as international security (Gaskarth 2015; Gray and Murphy 2014). They hold the currency of military and

economic power that can be converted into influence and standing. The contribution to the provision of international security builds up the standing of the rising power. Hypothetically, both the regional and the global political level can enable rising powers to improve their international standing and prominence (Barnett 1995).<sup>3</sup> We show that ideational regional conditions inform rising powers' decision to allocate their resources predominantly to regional organizations or to the global one.<sup>4</sup>

### Theoretical building blocks

When can we speak of regional ideational affinity? What are the different opportunities and constraints of regional and global organizations? To understand the concepts behind our argument and their modalities, we discuss our theoretical building blocks.

#### *Rising powers and the degree of ideational affinity*

Rising powers find themselves in ideational contexts that can be characterized by either relative affinity or diversity. These ideational contexts can be characterized mainly based on the interpretation and linking of two norms and values: sovereignty and political community. Values are conceptions of the desirable (Williams 1979) and norms denote an appropriate standard of behaviour (Katzenstein 1996). They serve as selection criteria in political action and competition.

When conceiving of the domain of multilateral security cooperation and the choice of responding to security threats, two fundamental questions structure the debate. To what degree should actors share responsibility (*depth of cooperation*)? With whom should actors share responsibilities (*political community*)? These are the fundamental questions that governments need to answer.

Based on their answers to the above questions, governments face the choice of: (i) addressing security threats unilaterally or multilaterally, and if multilaterally, integrating their policies into supranational organizations (that is, delegating responsibility for confronting threats to a higher locus of authority) or cooperating on an intergovernmental basis; and/or (ii) engaging in world politics as part of a regional political community, with a group that acts together, whether because of some functional logic or simply by accident, or nationally (Hofmann 2013). Of these different interpretations, some states value their national foreign and security policy first and foremost and are often not willing to commit to multilateral forums in any form (political community = national and sovereignty = unilateral). Or states can emphasize subregional or regional affiliations to which they have the greatest affinity and interpret sovereignty in conjunction with their interpretation of political community. Even if states have not fully internalized these norms and values (Johnston 2001), mechanisms such as rhetorical entrapment (Schimmelfen-

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<sup>3</sup> Regions are relatively porous social constructs that can be imagined in different ways (Katzenstein 2005). These "imaginings" give rise to different organizational expressions.

<sup>4</sup> This is not to say that factors such as the nature and frequency of threats or the material abilities of states do not also matter in explaining these choices. However, we argue that at least some of these factors can be better understood if studied through the lens of regional ideational constellations.

nig 2001) ensure that they cannot simply pay lip service to them but can also be held accountable by their fellow member states.

Different governments within one region (or within one country across time) might interpret these values and norms differently. If governments within a region share a common interpretation of the values, then we can speak of regional ideational affinity. However, if governments understand political community differently within a region, for example, if some understand their only political community to be their nation-state while others adhere to a political community larger than the nation-state (for example, Bolivarian solidarism; Dominguez 2007), it is possible to observe regional ideational diversity.

### *Forum shopping and ideational affinities*

Regional ideational affinity or diversity impacts IO and cohesion of purpose. As Barnett (1995, 420) has already observed,

regional organizations are not immune from polarizing coalitions that reflect not consensus and shared interest but rather discord and competitive rivalries; the degree to which the region tends towards consensus rather than competition will positively affect the organization's effectiveness and ability to respond to identified threats.

Regional diversity can furthermore lead to (autonomous) subregional groupings. Regional ideational affinities, on the other hand, can convince the rising power to make use of regional organizations as its power base.

To contribute to a stable security environment and to provide the international public good of security means (i) to contribute to the development of norms that regulate interventions and to contribute (ii) financially and (iii) materially to such interventions. To do so, many states can choose among several organizational options, in particular on the global and regional level. The global security organization in the realm of security policy is the UN. Its General Assembly offers UN member states a stage where they can present their ideas relating to peace and security;<sup>5</sup> however, the actors deciding on these matters sit on the 15-country-strong UN Security Council in which only five states (China, Russia, France, United Kingdom and the United States) have veto powers. The remaining ten states are voted onto the Security Council by the General Assembly for two-year terms. South Africa held a seat twice (2007–2008, 2011–2012) and Brazil ten times (five times alone after the end of the Cold War). Regional organizations represent macro-regions and smaller subregional meetings of states (Barnett 1995, 419). In the Americas, the OAS and UNASUR are of interest, while in Africa, AU and SADC play an important role. Each of these organizations has advantages and disadvantages that we address in the following paragraphs.

Global organizations can present several potential advantages to rising powers. For instance, they can provide a global platform, which *amplifies* rising powers' projection and international standing. Discussing and acting within a global organization can reveal previously unknown common preferences among states and *facilitate coalition-building* (Johnstone 2007). States can make their preferences heard and then

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<sup>5</sup> The UN's General Assembly has limited powers that focus on financing and monitoring Security Council-mandated operations. Formally, based on Resolution 377, the General Assembly can act if the Security Council fails to do so, but it has only employed this option to establish United Nations Emergency Force (UNEF I) in 1956.

hide within the large number of member states (*face saving*); or states can draw *political capital* from joining a minority opinion. Constraints exist as well. Presenting your preferences to a global audience, by definition, implies that the group is heterogeneous in terms of its preferences (Snidal 1994). Such a group of states can lead to *prolonged* or even protracted negotiations with no policy outcome. This is particularly problematic in the policy domain of security where urgency requires decisiveness. Global membership organizations allow a state to make its voice heard, but do not necessarily resolve collective action problems (Pouliot 2011).

While global organizations allow for the global dissemination of national preferences, regional organizations are more contained. Negotiations and bargaining among the members of regional organizations remain primarily within the region. Rising powers cannot hide behind other states in regional organizations but—depending on the degree of ideational affinities—are at the forefront of political debates (as initiator, target or arbiter). If the region is ideationally aligned, regional organizations enable rising powers to *solidify* their regional standing and push for policy outcomes at the regional level. They can facilitate collective action and encourage solidarity, for example, through side payments and allowing free-riding behaviour. They can marry ‘power with purpose, by projecting an image of the future and a vision of progress that attracts other states’ (Barnett 1995, 422–423). In addition, the smaller decision-making bodies in regional organizations—if ideationally aligned—can lead to *faster* decisions (Hardt 2014). In these cases, regional organizations also allow rising powers to *insulate* themselves from the competition and prolonged negotiations of the broader global stage. States that share ideational affinities are arguably better positioned to realize the organization’s goals.

Acting through regional organizations also has its downside: debating and acting in regional organizations provides rising powers, arguably, with a *limited* effect on the global stage. In addition, if the region consists of governments that are ideationally not aligned, it is difficult for regional organizations to make policies because of the limited number of possible coalitions, which becomes more problematic when decision-making requires consensus, as is the case in the OAS. Furthermore, regional organizations might be more *constrained*—and hence constraining—in terms of the material capacities. If resources are lacking, the rising power might find that it has to provide most of the funding for the implementation of the regional organization’s policies. Or, if the rising power is unable or unwilling to provide the regional organization with the necessary resources, then its participation in policy-making in this organization may diminish its international standing because it would be associated with a regional organization that is not able to implement its own policies.

Based on the preceding discussion, we propose the following argument: acting within IOs to establish and preserve international standing is significantly *facilitated* if the fellow member states are ideationally aligned with one another. This facilitates institutional mediation of power differentials. In other words, ideational affinities (that is, similar interpretations of the values political community and sovereignty) within a region reduce the perception that power disparities are the primary mode of interaction.<sup>6</sup> A rising power in a relatively ideationally homoge-

<sup>6</sup> Kacowicz (2005) observes that the shared norm of non-intervention explains South America’s zone of peace. We present a more nuanced view, showing that while non-intervention rooted in strict interpretations of national sovereignty operates in the Americas, some states interpret values differently and this variance is reflected in an organizational spaghetti bowl.

neous regional environment can speak on behalf of the region and use the regional organization to amplify its international standing without necessarily appearing as a challenger to other regional states. As a result, the rising power will focus on regional security institution-building and allocate its finite resources to strengthening regional organizations rather than the global one. If a region's ideational constellations are manifold and competitive, the rising power is more constrained in its resource allocation to the regional organization because it cannot claim to represent the collective will of its region in relation to when and where intervention should happen. Building and maintaining regional security organizations becomes a time-consuming bargaining process in which a lot of political capital might be wasted. Improvement of international standing becomes harder via the vehicle of regional organizations. Instead, a rising power will opt for the global level to improve its standing as the global organizational level diffuses regional competitive ideas.

### **Ideological (in)coherence in action**

To illustrate our argument empirically, we examine how Brazil and South Africa appreciate their organizational possibilities. We show how they (i) contribute to normative developments within organizations and (ii) respond to specific crises, and we (iii) look into the extent of institutional (material and ideational) investment of each rising power.

### **Brazil: regional ideational diversity and organizational complexity**

Threats to national security are a recurrent feature in the Americas (Chipman and Lockhart Smith 2009/2010, 84). Domestic, transnational and international security threats related to drug trafficking and arms trading exist and spillover effects are possible because of uncontrolled, uncontrollable or disputed borders making the region volatile (Buhaug et al. 2007). Instead of having one organization tackle the region's security problems, the Americas is an example of the alphabet spaghetti bowl in which multiple and competing regional organizations serve as *magnifiers of national preferences and regional visions of political community* (Tussie 2009).<sup>7</sup> When it comes to matters of international security within the American region, Brazil, as a rising power with high military expenditures (Perlo-Freeman and Solmirano 2014, 2) and armed forces personnel (World Bank Group 2015)—second only to the United States in both rankings—often opts to act through the UN instead of pushing for a regional solution.<sup>8</sup>

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<sup>7</sup> Some organizations are primarily focused on fostering peace and stability through economic means while others include more military means.

<sup>8</sup> Brazil's first involvement with UN Peace Operations was in 1956 (First United Nations Emergency Force, UNEF I), followed by the deployment of personnel to United Nations Operation in the Congo (ONUC), United Nations Security Force in West New Guinea (UNSGF), United Nations Peacekeeping Force in Cyprus (UNFICYP), Mission of the Representative of the Secretary-General in the Dominican Republic (DOMREP), United Nations India-Pakistan Observation Mission (UNIPOM) In 1968, the Costa e Silva government introduced a more isolationist foreign policy that prevented any major Brazilian diplomatic engagement with the UN. As a consequence, Brazil did not assume a non-permanent seat at the Security Council until 1988 and it left the UN Special Committee on Peacekeeping Operations (known by then as C-33) in 1977, returning only in 1997. Brazil re-engaged with UN peace operations after its democratic transition.

*Relative ideational diversity in the Americas*

Even though threats and risks persist, the existing global, regional and sub-regional organizations in the Americas are not orchestrated. One of the reasons is that the Americas are ideationally diverse. Political community and sovereignty are interpreted differently across the region and consequently (i) different regional organizations exist and (ii) the legitimacy of interventions is understood differently across countries.

Some governments insist on national sovereignty as their core value in any security policy-making (Dominguez 2007, 91–3, 103). The US, Brazil and Argentina belong to this group. The US has insisted on its national sovereignty and national political community and intervened based on this understanding of the Americas (for example, the Monroe Doctrine, the Platt Amendment and Operation Condor) (Rabkin 2004). Chipman and Lockhart Smith (2009/2010, 82) observe an ‘emerging radical nationalism’ within Brazil. Initially, Brazil’s understanding of sovereignty informed policies of non-interventionism. Today, sovereignty is understood not as a defense mechanism adopted to avoid intervention, but instead as the fundament of Brazil’s rising power (Maior 2003) that endows Brazil with the capacity to conduct interventions abroad. The primary political community that Brazilian governments care about is the national one. While Brazil appreciates its neighbours that share historical experiences and geographical proximity, hardly any Brazilian government has understood itself and its neighbours as more than just neighbours. Argentina values national sovereignty and national political community (Kirchner 2010). As a result of these interpretations, these countries see potential regional projects as a vehicle for *national* projects but cannot always act upon them given the constraints posed by regional ideational differences.

Regional ideational differences manifest themselves within other governments that have a more ambivalent interpretation of sovereignty and are more insistent on a regional political community that is held together by Bolivarian solidarity (Dominguez 2007; Tussie 2009). Venezuela (Correio Bolivariano de Venezuela 2011), in particular, but also Bolivia and Ecuador, value relations with their regional neighbours in terms of solidarism and social justice. Given that this political community is built on social-democratic to socialist values, governments adhering to these interpretations are very sceptical of any US involvement in what they see as their potential political community.

*The regional organizational options: Bolivarian community or national sovereignty?*

Given Brazil’s geographical location (it shares a border with every country on the continent but Chile and Ecuador), it has an interest in border security (and widespread regional political stability). The main regional organization at Brazil’s disposal is the OAS. Article 2 of the OAS Charter describes the organization’s mission to ‘strengthen the peace and security on the continent’. In recent years, Latin American countries have also tried to establish another regional organization, UNASUR.<sup>9</sup> Both organizations, while they exist as platforms to exchange ideas, are not very robust due to ideational differences.

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<sup>9</sup> Another regional organization is the Community of Latin American and Caribbean States (CELAC). Given that Brazil’s preferences for UNASUR and CELAC are similar, we chose to discuss UNASUR for reasons of space.

The OAS, despite its long existence, is deemed ‘very incoherent’<sup>10</sup> by some. It mostly relies on the exchange of information, best practices and legal mechanisms instead of security capabilities.<sup>11</sup> The workings of ideational diversity are particularly visible here as diversity shapes the member states’ performance in the OAS; member states use the organization to voice their disagreements with one another.<sup>12</sup> For example, the US uses the organization for its own regional policies, especially for the “war on drugs” (Chillier and Freeman 2005). It pushes other American states towards a policy of militarization of domestic issues, wanting to empower the national military to stop the drug route towards the US (‘Declaration on Security in the Americas’, OAS, October 2003). Brazil, on the other hand, is not keen on following US preferences regarding matters of security and interventionism (Chipman and Lockhart Smith 2009/2010, 90) even implicitly suggesting in its National Defense Strategy that the US could be seen as a threat (Weiffen et al 2013, 382).

In particular when it comes to interventions, Brazil shows its reluctance to work with the OAS. When Brazil decided how to participate in a possible intervention in Haiti in the aftermath of the *coup d’état* against President Jean-Bertrand Aristide in February 2004—a political crisis that turned into a threat against international security—Brazil chose to act with the UN. Ideational diversity compromises the potential of the OAS to serve as the preferential option in which the regions’ rising power would invest its resources. By the time the crisis in Haiti started, Brazil had not stepped up to invest in the public good regionally (Flemes and Vaz 2011). Since the start of the Haitian crisis in 2004, Brazil has sent only eight authorities to make public speeches at the OAS, and none of them were about Haiti. While the US government has sent its national security advisors, Secretary of State and the President to address the OAS, the same cannot be said about Brazil; neither a Brazilian president nor a minister of foreign relations can be found among the speakers. The Brazilian decision to not prioritize the organization as the main channel to provide public goods during the crisis in Haiti had a decisive impact in the general involvement of OAS in the event; it was removed from the events (Herz 2008, 20). Only recently has Brazil started contributing, with one ambassador to the OAS electoral observation mission.

Brazil’s nonuse of the OAS during the Haiti crisis is indicative of a broader phenomenon. Showing a lack of preference for the OAS as an option for resource allocation, Brazil has kept its financial contribution to the organization at the minimum, and it has not engaged with the organization’s development of multilateral security policy. For example, between 1995 and 2014, the Brazilian government volunteered to chair the Committee on Hemispheric Security once, while Mexico, for instance, held the chairmanship three times. Since 2011, Brazil has not sent a permanent diplomatic representative to the organization (Conectas Human Rights 2015).<sup>13</sup>

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<sup>10</sup> Telephone interview with Brazilian diplomat, New York City, 10 September 2014.

<sup>11</sup> Interview with OAS senior official, Secretariat for Multidimensional Security, 29 August 2014.

<sup>12</sup> Interview with OAS official, Secretariat for Political Affairs, 29 August 2014.

<sup>13</sup> This has partly happened because of the OAS’s opposition to and concerns regarding the construction of the Belo Monte Dam in Brazil expressed in August 2011. We thank one of the reviewers for this comment.

Another regional option for Brazil to demonstrate leadership and push for international standing is UNASUR. UNASUR's Constitutional Treaty was signed in 2008 and went into force in 2011, establishing the new regional organization. UNASUR's security role is broad but so far has mainly focused on drug trafficking, organized crime, interstate disputes and interpersonal violence. But Brazil has not taken up this organizational option much to push for a more robust set-up for the establishment of international peace and security. Again, a robust regional security organization does not sit well with other ideational interpretations within the smaller subgroup of states.

Brazil has so far not been capable (and, arguably, willing) of bridging ideational differences as UNASUR confronts the diverse problems facing the region. Its reluctance to adopt a more assertive role in the region and restrained support for UNASUR can be understood in terms of Brazil recognizing that UNASUR is not a launching pad for its rising power status as long as ideational diversity persists. Consequently, 'Brazil has kept UNASUR relatively toothless' and is interested more in the 'symbolism of cooperation' (Stuenkel 2013).

Brazil refocused its regional politics temporarily with Lula coming to power. Under the Lula government, Brazil reinterpreted political community more in alignment with the Venezuelan and Bolivian governments. This mitigated differences among Brazil, Bolivia, Venezuela and Colombia and opened a window of opportunity to push for a regional security agenda. The Lula government proposed to establish the South American Defense Council (SDC) as part of UNASUR in 2008 to address regional security problems and serve as coordinating mechanisms (Flemes et al 2011), thereby paying attention that the new structure would not curtail its sovereignty.<sup>14</sup> Lula then used UNASUR structures to mediate the conflict between Colombia and Venezuela in 2010, which addressed their border conflict at least temporarily. However, under the successor government led by Rousseff, Brazil did not take up leadership in mediating the Venezuelan political crisis, which turned violent in 2013–2014.

Overall, regional ideational diversity has so far undermined the level of cooperation and has challenged the creation of a robust security regional organization in which Brazil could solidify its position and try to aggregate power in the regional context to improve its standing to the global level. UNASUR 'exposes clearly the divisions in South American security perspectives' (Chipman and Lockhart Smith 2009/2010, 79). Already at SDC's initiation, Colombia did not want to participate. Venezuela wanted the SDC to be NATO-like (with a focus on collective defense and security), the so-called SATO, but Brazil resisted (Weiffen et al 2013, 377; Stuenkel 2013). Secondly, Argentina, and to a much starker degree Venezuela, challenged Brazil's leadership. Venezuela under Chavez has pushed for the Bolivarian Alliance for the People of Our America (ALBA)—an organizational solution without Brazil (Chipman and Lockhart Smith 2009/2010, 86). There are also many bilateral initiatives such as the binational battalion for joint peace operations (since 2006) between Argentina and Chile, which are not easily submerged into multilateral structures.

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<sup>14</sup> UNASUR offers Brazil a mechanism to have access to all South American states' procurement policies and to suggest defense procurement purchases.

*Going global: avoiding regional competition*

Even though Brazil did not engage regionally in Haiti, it did so globally. When the Haitian crisis of 2004 was brought to the attention of the United Nations Security Council (UNSC), it served as an opportunity to improve Brazilian international standing. Not only did Brazil lead United Nations Stabilization Mission in Haiti (MINUSTAH) but it also contributed half of the troops to the operation (UNDKPO 2015). Participating in and leading such operations demonstrates its will to contribute to the international public good of security. MINUSTAH's troop-contributing countries were mainly from South America, but they operated under Brazilian command under the UN umbrella. While operating under Chapter VII might have been exceptional (Kenkel 2010), given Brazil's conservative interpretation of national sovereignty, MINUTASH can be seen as one way that Brazil improved its international standing. Brazil's participation in the operation stressed its leadership and power potential that can be exercised rather on the global than on the regional organizational level.

Brazil's leading role in MINUSTAH is but one indicator demonstrating that Brazil privileges the UN over regional organizations and consequently allocates its military, financial and political resources mainly in this organization. Brazil sees the UN as offering a platform to present its preferences to the global and regional community of states and engage in international security issues; it is the preferred vehicle to accommodate Brazilian ambitions (Viotti 2010).<sup>15</sup> Different interpretations of political community (national versus subregional versus regional) and sovereignty (and hence interventionism) complicate Brazil's attempts to improve its international standing by using the region as the main channel to project power. This tension does not automatically translate to the global level. Through the UN, Brazil can avoid direct confrontations with other American countries.<sup>16</sup> In the words of a Brazilian diplomat, the UN allows Brazil to use its resources 'carefully'.<sup>17</sup> Hence, Brazil has also used the UN to manifest its international standing and reach through obtaining a non-permanent membership status within the UNSC. Since 1992, Brazil has invested in campaigns to run for the position five times and was elected four times.<sup>18</sup>

To further improve its international standing on the global stage, Brazil participates in normative discussions on the UN level, at times representing minority (but not regionally informed) opinions. In the words of a Brazilian diplomat, Brazil understands itself to be 'a reformist but not a revolutionary'.<sup>19</sup> For example, based on its ideational leanings that insist on national sovereignty, Brazil voices its concern about the standards of intervention. Ever since the UN interpreted humanitarian interventions not only under Chapter VI but also under Chapter

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<sup>15</sup> Telephone interview with Brazilian diplomat, New York City, 10 September 2014. Since then, Brazil's global engagement has also had positive repercussion on the regional level in terms of defense and security cooperation. After the intervention in Haiti, South American states have developed training and exchange opportunities between their armed forces, including the creation of a Latin American Peacekeeping Training Centers Association (ALCOPAZ) and efforts to promote joint peacekeeping participation. Arguably, this would not have been possible without first acting jointly under the UN umbrella.

<sup>16</sup> Initially, Brazil has seen the UN as a platform to connect with countries that shared the same colonial history, in other words, with the lusophone world (as was the case with the deployment of military observers and/or troops to the UN interventions in Angola, Mozambique, and East Timor) (Nasser 2012).

<sup>17</sup> Telephone interview with Brazilian diplomat, New York City, 10 September 2014.

<sup>18</sup> Japan and Brazil are the two countries that have held non-permanent UNSC positions the most throughout the UN's existence.

<sup>19</sup> Interview with Brazilian diplomat, Washington DC, 3 September 2014.

VII, Brazil has been hesitant to adopt this interpretation or act accordingly (Cavalcante 2010). When the policy norm of responsibility to protect (R2P) emerged, Brazil questioned it not least out of ideological reasons. But instead of rallying like-minded states regionally (for example via UNASUR or the OAS), Brazil has engaged with the normative discourse on the UN level. The Brazilian government proposed a refinement and reformulation of R2P emphasizing responsibility while protecting. The document *Responsibility While Protecting: elements for the development and promotion of a concept* was presented to the UN's General Assembly on 11 November 2011. Since the presentation of *Responsibility While Protecting*, Brazilian diplomats—in particular in New York City and The Hague—have reminded the international community of R2P's contestation. Some governments have taken on Brazil's discourse, but its reinterpretation has not received universal acceptance and suffers from the polarization within the UNSC.<sup>20</sup>

Another indicator of circumventing ideational diversity and regional competition is Brazil's military and financial contribution and participation in UN operations—as long as its economy was growing. Not only has Brazil not reallocated institutional investment on the regional level, it has strengthened its investment on the global level. Brazil has been engaged in UN peace operations in places such as Angola, East Timor, El Salvador, Nicaragua, Lebanon and Haiti, but also in Sudan, Kosovo and Cyprus. Whether the operation was within its region or outside, the vehicle of intervention was the UN. Furthermore, Brazil has been the biggest contributor in terms of financial means from the region (UN Regular Budget 2014); however, Uruguay, Argentina and Brazil have been replacing each other in terms of who the biggest UN troop contributor of the region is. Not only has Brazil been engaged in these operations, it took on leadership roles several times. For example, it took over the command of United Nations Interim Force in Lebanon's (UNIFIL) Maritime Task Force (the first task of this kind in a UN peace operation) from Italy in 2011 and has provided the force commander to the UN's biggest and most offensive peace operation, United Nations Organization Stabilization Mission in the DR Congo (MONUSCO) in 2013. Furthermore, it has contributed voluntarily to the UN budget as opposed to the OAS budget (Agence France-Presse 2012). In 2012, the UN budget was revised and the 5th Committee proposed an increase of 5% in the overall budget (US \$243.3 million in relation to the period 2011–2012) that amounted to US \$5.4 billion for the period 2013–2014. The European countries, as well as Japan, were not willing to increase their contributions, since they were highly affected by the global economic crisis. In order to avoid a general fiscal crisis, Brazil, together with China, Russia and India, accepted an unprecedented increase in their contributions in order to allow France, UK, Germany and Japan to decrease their contributions. The deal led Brazil to increase by 82% its contribution (from 1.6 to 2.9% of the budget) (Agence France Presse 2012).

### **South Africa: regional solidarity and organizational complexity**

The African continent is plagued with a multitude of security threats and problems—civil wars, coups, unstable regimes, transnational militia, terrorism, epidemics, environmental disasters and the trafficking of drugs, humans and arms across porous borders. The UN and African regional and subregional organiza-

<sup>20</sup> Telephone interview with Brazilian diplomat, New York City, 10 September 2014.

tions all attempt to address Africa's multiple security threats and sources of instability. Unlike the Americas, where various ideational leanings have led to different overlapping organizations that are relatively weak, African states have generally tried to reduce the overlap between their peace and security organizations. The AU, as the only continental organization, helps to mediate between Africa's sub-regional organizations and the global organizational level. The relative ideational affinity between African states facilitates South Africa's focus on investing in regional, rather than global, security organizations. Most African states interpret this political community as *Pan-Africanism* (Amegan and Degila 2015), permitting the prioritization of both African unity and juridical sovereignty.

### *Relative ideational affinity in Africa*

South Africa shares common interpretations of values and norms relevant to security cooperation with other African countries. This does not mean that the continent of Africa can be considered a monolith whose single voice manifests itself in the AU. But many African countries adhere to—at least rhetorically—and interpret the value of political community in terms of a version of Pan-Africanism<sup>21</sup> and sovereignty in term of intergovernmentalism. African states have a 'mutual interest in recognizing each other's juridical sovereignty and territorial integrity, which, in effect, translated into a collective recognition that their principal threats derived from the domestic rather than the international system' (Barnett 1995, 422).

South Africa, as the only so-called rising power on the continent, along with the other four of the 'Big Five' countries in Africa—Nigeria, Algeria, Ethiopia and Egypt—and many other African states have committed themselves to building a political community in which African countries try to overcome war and security threats together (African Union 2013).<sup>22</sup> In spite of its status as a rising power, South Africa describes Africa's advancement as synonymous with its own and is aware that efforts to forcefully impose its power would actually undermine its position both regionally and globally (Flemes and Vaz 2011).<sup>23</sup> South Africa's post-apartheid foreign policy focuses on building African security and development institutions, forming alliances with other African states, such as Algeria and Nigeria, regional peacemaking and regional peacekeeping and respect for the principle of non-interference in the sovereign affairs of neighbouring states. Nigeria, likewise, has made African development and security the cornerstone of its foreign policy in line with the following principles: 'African unity and independence; peaceful settlement of disputes; nonalignment and no intentional interference in the internal affairs of other nations; and regional economic cooperation and development' (Federal Republic of Nigeria 2014).

In his 1996 'I am an African' speech, South Africa's former President, Thabo Mbeki, articulated the ideas behind this Africa-centred approach. 'I am an African.

<sup>21</sup> The cynic might want to add that a tolerance for corruption forms another element of a shared political community.

<sup>22</sup> Interviews with the head of the Economic Community of West African States (ECOWAS) liaison office to African Union Commission/Peace and Security Council, 19 June 2015; interview with Benin and Cameroun diplomats, 22 June 2015; interview with African Union Commission/Peace and Security Council diplomat, 22 June 2015. All interviews took place in Addis Ababa.

<sup>23</sup> South Africa has the largest gross domestic product (GDP) in Africa (IMF 2014) and one of the largest armed forces, which is technologically more advanced than others in the region.

I am born of the peoples of the continent of Africa. The pain of the violent conflict that the peoples of Liberia, Somalia, the Sudan, Burundi and Algeria is a pain I also bear' (Mbeki 1996). Mbeki accompanied his pro-African rhetoric with an anti-imperialist stance that rejected past and present Western intervention in Africa, seeking to 'deflect any suspicion that an activist post-apartheid government would use its material power for coercive purposes in Africa' (Alden and Schoeman 2013, 113). South Africa's role as Africa's rising power is therefore imbued with a paradox: even though it is the richest and one of the most militarily powerful countries in Africa, it has consistently exercised 'political and strategic self-restraint in its own unstable sub-region' (Flemes and Vaz 2011, 16; see also Nathan 2005, 365; Taylor and Williams 2006, 6–7). 'South Africa's reunification with the rest of the continent had been a significant sub-narrative' (Vale and Maseko 1998, 271) in the fight to end apartheid. In April 1994, with the election of Nelson Mandela as the President of South Africa and the official end of apartheid, South Africa started to work together with other African leaders to promote Pan-Africanism.

#### *Going regional: committing to regional organizations*

While South Africa is geographically located at the tip of the continent and its borders are not contested, South Africa has repeatedly opted to work with its regional organizations, the AU and SADC. South Africa enabled the AU to deploy its first peacekeeping mission—the African Union Mission in Burundi (AMIB)—in 2003, allocating approximately US\$ 110 million and the initial contingent of 1600 of military personnel for the mission (Boshoff and Francis 2003).<sup>24</sup> At the request of Nelson Mandela, the mediator of Burundi's Arusha Peace Process, South Africa deployed peacekeepers to enable and oversee the implementation of Burundi's peace agreement. South Africa responded when the UN Security Council refused to do so and when other African countries delayed deploying the troops that they had committed (Jackson 2006). In so doing, South Africa launched the AU's foray into regional peace operations, helping to establish it as a guarantor of regional peace and security in Africa.

This organizational choice is only one among many that demonstrate South Africa's preference for the role of regional (and subregional) organizations in contributing to the undeniable socially valued objective of creating and maintaining international peace and security. These choices are not obvious given that South Africa is considered a rising power and is a member of the UN. Despite these global recognitions, it wants to improve its international standing primarily via the regional route. Compared to the other BRICS (Brazil, Russia, India, China, South Africa), South Africa falls behind in terms of military and financial power. And the AU is financially dependent on external partners such as the EU. However, this has not motivated South Africa to predominantly choose the UN with its established organizational structures and resources for peace operations. Instead, its consecutive governments have repeatedly stressed the primacy of the AU for their peace and security actions—and see the UN as a necessary add-on to provide resources and know-how to strengthen African peace operations (Nathan 2013).<sup>25</sup> And, lastly, South Africa has chosen to act with regional or subregional organiza-

<sup>24</sup> Written communiqué from Cedric de Coning, 21 August 2014.

<sup>25</sup> Interview with African diplomat, Addis Ababa, 19 June 2015.

tions rather than with the UN. This is so despite the fact that the AU proclaims via its Constitutive Treaty that it has authority to launch a peace operation without a UN mandate. Some AU diplomats see the UN as acting with a 'dehumanized business plan'<sup>26</sup> when it gets involved in African peace and security affairs.

Rather than intervene unilaterally or with the UN in the continent's multiple crises, South Africa has focused its political and financial resources on strengthening the capacity of regional organizations, and particularly the AU, composed of 54 of Africa's 55 states. The AU is seen as the primary coordination mechanism whose endorsement is sought after and that can distribute important resources to conduct peace operations.<sup>27</sup> South Africa has provided staff for key top-level positions at the AU (for example, since 2012 the South African Nkosazana Dlamini-Zuma has been the AU Commission's chairperson) and served on the AU's Peace and Security Council for eight of its ten years of existence (courtesy of its region which has reelected South Africa into this position many times). Along with four other African countries (Nigeria, Libya, Algeria and Egypt), South Africa provides 15% of the budget for the Africa Peace Fund, the AU's fund used in the initial phases of its peace operations, in addition to its annual required contribution to the AU.<sup>28</sup>

The AU has primacy over the subregional organizations as outlined in its Protocol Art. 16. While this primacy might be contested at times, both the AU and subregional organizations work systematically in a coordinated fashion.<sup>29</sup> South Africa's actions within both organizations reflect this nested organizational approach. South Africa's investment in SADC and in its emergent African Standby Force (ASF) for Southern Africa is an extension of its commitment to African regional organizations and a shared continental ideology of the Pan Africanism that embraces "African solutions to African problems" (Coning 2014; Lotze 2013).<sup>30</sup> Rather than attempting to export its way of doing peacekeeping, like Brazil has done (Kenkel 2010), South Africa and the AU emphasize the particular nature of conflict prevention and peacekeeping in Africa and the particular set of African solutions and capacities required (Gelot et al 2012).

Rather than dwelling in competition with other regional states, like Angola or Zimbabwe, South Africa has focused on forming alliances with other (sub) regional powers to create viable regional security organizations (Nathan 2005, 365; Lotze 2013; Matshiqi 2012, 42). Relative regional ideational affinity facilitates such a policy. To strengthen the AU's capacity to guarantee regional security, 'the foreign policy elite in Pretoria engaged in deft and carefully calibrated geo-strategic diplomacy in the continent and abroad', gaining 'supporters and allies' (Lansberg and Kondlo 2007, 1) everywhere in Africa. In particular, South Africa has sought to work together with Nigeria and Algeria to 'constitute themselves as an axis of synergy in advancing the AU Agenda' both regionally and internationally

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<sup>26</sup> Interview with African diplomat, Addis Ababa, 19 June 2015.

<sup>27</sup> Interview with EU diplomat, Addis Ababa, 22 June 2015.

<sup>28</sup> Written communiqué from Walter Lotze, 27 August 2014. The rest of the fund is paid by external donors, mainly the EU.

<sup>29</sup> Interview with AUC PSC diplomat, Addis Ababa, 22 June 2015.

<sup>30</sup> Pan-Africanism is an ideology that promotes solidarity among Africans at home and in the global African diaspora. It focuses on 'collective self reliance' and is 'a belief that African peoples, both on the continent and in the Diaspora, share not merely a common history, but a common destiny' (AU ECHO 2013, 1). Contemporary Pan-Africanism originates from the 15th Pan-African Congress in 1946, which set the agenda for the political liberation of all African peoples (AU ECHO 2013).

(Kornegay 2012, 13). Even though, like Brazil, South Africa faces military interference by the global hegemon in the form of the United States Africa Command (AFRICOM), it has chosen to view its power in the region, and internationally, as a corollary of its capacity to collaborate with and lead African states, not directly challenge the power of the US. In 2011, South Africa's president Jacob Zuma confirmed that the 'African Agenda remains our key policy focus' (Matshiqi 2012, 43).

*Going global: global participation with regional ambitions*

Given the relative ideational affinity in Africa around the values political community and sovereignty, South Africa has seen no interest in using the UN to silence differences on the African continent and to improve its international standing. The resources that South Africa allocates to the UN are for African purposes rather than global ones—and they trickle back to the AU. When acting on the global stage, the UN, South Africa has often used its rising power to help strengthen African regional organizations and voice African concerns (Matshiqi 2012). To that end, South Africa has campaigned for a UNSC non-permanent seat. During its first UNSC tenure, South Africa's former Minister of Foreign Affairs Dr Nkosazana Dlamini-Zuma declared, 'the Security Council was a useful platform for intensifying the work South Africa had already undertaken in conflict resolution in Sudan, Côte d'Ivoire, Burundi, the DRC and elsewhere' (Matshiqi 2012, 42–43). Observers of South Africa's 2007–2008 tenure in the UNSC qualify it as 'controversial' (Serrao 2011, 2) given its advocacy for African issues. South Africa's Department of Foreign Affairs, South Africa (2008) declared:

South Africa utilises the Security Council seat to advance and consolidate the African Agenda. South Africa has prioritised African conflict resolution and improving the relationship and coordination between the African Union (AU) and the United Nations (UN), which was the theme of the South African Presidencies of the Council in March 2007 and April 2008. ... President Thabo Mbeki convened a Summit-level meeting of the Security Council in April 2008 on this theme ... including financing mechanisms to ensure that African peacekeeping operations are fully operational and sustainable.

As the above quote suggests, the severity and scope of the security threats on the African continent, and the relative newness of African regional organizations, necessitate the financial and logistical support of the UN, other regional organizations such as the European Union, and Western donors (Coning 2010).<sup>31</sup> Over time, South Africa has become the fifth strongest African contributor to UN operations, behind Ethiopia, Nigeria, Ghana and Rwanda (UNDPKO 2015). However, these contributions are concentrated on the African continent, and most operations are hybrid or transition operations with African regional organizations. South Africa and other African states, such as Nigeria, are aware of this fact and have advocated for increased financial, logistical and political support for African regional organizations (Kornegay 2012). Rather than using its increasing power in global organizations to advocate directly for its prominence in the UN, South Africa has allocated its finite political resources to promote African organizations and security, in turn positioning itself as the voice of African interests. A shared

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<sup>31</sup> Interview with EU diplomat, Addis Ababa, 22 June 2015.

understanding of political community as Pan-Africanism (with the ultimate goal of the African Renaissance) provides the necessary ideational landscape to build on an African organizational solution. Hence, during its 2011–2012 tenure, South Africa took on the chair for the Working Group on Conflict Prevention in Africa (although two more African states—Nigeria and Gabon—were non-permanent members during the tenure), pushing again for an African Agenda. The AU had explicitly endorsed South Africa's repeated candidacy for the non-permanent seat at its 14th Ordinary Session in early 2010. As such, it had 'a mandate to represent Africa's concerns on the Council' and coordinated with Nigeria and Gabon on African issues (Serrao 2011, 3).

## **Conclusion**

Brazil and South Africa resemble each other in several ways. Both countries are considered rising powers. Both countries have regional challengers. Both countries participate in peace operations. And both countries have regional and global organizations at their disposal to contribute to the maintenance of international peace and security. Given these similarities, why have South Africa and Brazil *emphasized* organizations operating on different levels through which to increase their international standing? South Africa has focused on the AU as its primary organization of engagement and was able to do so thanks to a common interpretation of political community and sovereignty across the region. Successive Brazilian governments, on the other hand, motivated by a national agenda that does not find consensus within the region, have primarily invested in the UN.

We have explained the different organizational choices of Brazil and South Africa by studying the degree of ideational affinities within their respective regions. These ideational constellations can change over time. When rising powers share common ideational interpretations with their neighbours at one point in time, this enables them to act and invest in regional security organizations without fearing continuous challenges from other regional players. More often than not, this encourages rising powers to give preference to the regional security organization rather than to the UN as a way to improve their international standing. This tendency is further increased if the regional institutional environment offers important opportunities for visibility and influence of the rising power on the international stage. If, however, the rising power does not share the same ideational interpretations as other states within its region, then the rising power will likely choose to focus its political and financial investments on the UN.

South Africa's and Brazil's respective choices to focus international security efforts on regional or global organizations may have a counterintuitive impact on their relationship with their region and the UN. Even though South Africa concentrates on regional organizations, it is open to discussions and knowledge transfer with the UN that could provide needed expertise and hardware. Brazil, on the other hand, participates most actively in the UN, but uses this multilateral platform to push its own national political agenda, resulting in possible antagonistic relationships with some UN members.

These findings have important implications for how we understand the emerging constellation of regional and global security organizations. While creating and

maintaining peace and security are socially valued objectives, the UN needs to accommodate regional organizations and rising powers' preferences. UN peace operations are known to be notoriously understaffed. Taking regional particularities and regional interpretations of so-called global practices into account might help innovate different mechanisms in which the UN and regional organizations can relate to one another.

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