

# **Policy transfer and learning research**

Insights from the South for concept and theory innovation

**FIRST DRAFT**

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## Abstract:

Policy learning and transfer studies showed a fertile ground for innovation on public policy analysis. In a globalized world, where State boundaries are permeable and public policy flows transnationally, the diffusion of policies is a phenomenon connecting domestic policymaking to international dynamics. Policy learning and transfer studies have accumulated a dense body of knowledge. Frameworks were produced Rose (1991) and improved Dolowitz and Marsh (2001), facilitating our analysis. The role of transfer agents (Stone, 2014, Porto de Oliveira, 2017), as well as international organizations (Weyland, 2006; Pal, 2009) was explored in depth. Within the European integration process, an independent set of works defined the field of Europeanization (Raedelli, Sauruger, Surel, 2006). Mechanisms as learning, coercion, emulation and competition (Graham, Shipan, Volden, 2013) were also defined as consensual by the literature.

A great part of the literature on policy transfers was developed taking into account the adoption of objects between Northern countries and from these to the South, as well as the role of international organizations as the World Bank (Woods, 2006), OECD (Pal, 2006) or European Union (Raedelli) on these processes. Policy models spreading along the 1980's under the so-called "Washington Consensus" is a clear example of this dynamic (Weyland, 2006). This movements have been recently turned upside down, with a fast growing mass of experiences travelling from South to South, for example within Latin American countries and from these to Africa, as well as from South to North. However, there is still little theoretical and conceptual contributions produced taking into account these dynamics and cases. How can recent experiences of policy transfer from the South improve on our understanding of policy transfer and learning processes?

Based on empirical material collected from 2007 through 2017 (around 170 in-depth interviews in more than ten countries) related to the Brazilian experience in terms of social policy internationalization (participative democracy, housing, food security and conditional cash transfers), the aim of this paper is to bring the contributions of the South to the policy learning and transfer debate, shedding light on what is similar and which new features have emerged in this context. It is argued on the one hand, that new actors that come onto the scene as "policy ambassadors" exporting policy knowledge and lessons, as well as "policy transfer institutions" and "policy transfer instruments". This paper intends to contribute to this debate both theoretically and conceptually.

## **Policy transfer and learning research:**

Insights from the South for concept and theory innovation

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### **Introduction**

Policy learning and transfer studies have proven to be a fertile ground for innovation in public policy analysis. In a globalized world, where national boundaries are permeable and public policy flows transnationally, the diffusion of policies is a phenomenon that connects domestic policymaking to international dynamics. Studies in the area of policy learning and transfer have accumulated a substantial body of knowledge. Frameworks have been proposed (Rose, 1991) and improved (Dolowitz and Marsh, 2001), facilitating our analysis. The role of transfer agents (Dunlop 2009, Stone, 2014, Porto de Oliveira, 2017), as well as international organizations (Weyland, 2006; Pal, 2009) has also been explored in depth. Within the European integration process, an independent set of works define the field of Europeanization (Raedelli, Sauruger, and Surel, 2006). Mechanisms such as learning, coercion, emulation and competition (Graham, Shipan, and Volden, 2013) have also been defined in a consensual manner in the literature.

A large part of the literature related to policy transfer has been developed taking into account the adoption of policies from Northern countries by countries in the South, as well as the role of international organizations such as the World Bank (Woods, 2006), the OECD (Pal, 2006) and the European Union (Raedelli) in these processes. Policy models which were diffused throughout the 1980s by the so-called “Washington Consensus” are clear examples of this dynamic (Weyland, 2006). These movements have recently been turned upside down, with a fast-growing collection of experiences travelling from South to South, for example within Latin America and from Latin America to Africa, as well as from the South to the North. However, there have still been few theoretical and conceptual contributions which have taken into account these dynamics and situations. How can recent experiences of policy transfer from the South improve our understanding of policy transfers and learning processes?

In this article, we understand policy transfer to be a learning process in which an institution of the State learns about instruments of public policy through relationships with other governments, private agents, international governmental and non-governmental organizations, organized civil society, etc. This article is therefore part of the literature that concerns policy transfer,

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diffusion and circulation (Dolowitz 2017) as well as policy learning (Dunlop 2009; Dunlop and Radaelli 2013).

There is an important area that needs to be explored more fully which deals with South-South and South-North policy transfers. The differences between these processes are important, and it's fundamental to add elements that can help complement concepts and theories that have already been constructed in this field. Using empirical elements to examine cases in the South to revisit the field of policy transfer and learning is the purpose of this article. In fact, the contexts in which policies travel and where the policy learning process takes place can vary substantially. The circumstances and social, political and economic conditions in countries in the South are very different from those in the European Union, the United States and Canada, just to mention a few. In addition, we're living at a time in which the models of the South are circulating more and more. Examples of this are social participation institutions, conditional cash transfers and food safety programs, on what regards the case of Brazil. This country will be the focus of this article, which is a continuation of the previous "Exporting Brazilian social policies: From local innovation to a global model" (Porto de Oliveira, 2017b).

Based on empirical material collected from 2007 through 2017 (around 170 in-depth interviews in more than ten countries) related to the Brazilian experience in terms of social policy internationalization (participative democracy, housing, food security and conditional cash transfers), the aim of this paper is to bring the contributions of the South to the policy learning and transfer debate, shedding light on what is similar and which new features have emerged in this context. It is argued on the one hand, that new actors that come onto the scene as "policy ambassadors" exporting policy knowledge and lessons, as well as "policy transfer institutions" and "policy transfer instruments". This paper intends to contribute to this debate both theoretically and conceptually. The article is divided in four sessions. The first discusses the contribution of the piece to the policy transfer, diffusion and circulation literature. The second introduces the role of the South on policy transfer. The third discusses transfer agents and the last one the role of transfer instruments.

## **1. International policy circulation and the South: a literature review**

The literature related to the international movement of public policies has become broader and more and more fragmented. There is a plethora of authors, little consensus, various research traditions and a myriad of terms used to describe this phenomenon. The bibliometric work of Graham, Shipan, and Volden (2013) shows the growth of studies in this area, as well as the elevated number of terms associated with the phenomenon of the diffusion of policies which have been extrapolated to an extreme. In reviewing the recent literature,

Porto de Oliveira and Faria (2017) point to the existence of three research traditions in the field of public policy analysis, which are respectively: the transfer, diffusion and circulation of policies. These traditions are associated with the extent and nature of the movement, the volume of adoptions analyzed and the region in which these studies have been developed. The literature has also produced independent currents related to sui generis empirical objects, such as the European Union and studies of Europeanization (Saurugger and Surel 2006; Radaelli 2008) for example.

According to these criteria, Porto de Oliveira and Faria (2017), consider these transfers as movements of short duration in which policy is transferred from point A to point B, in a form that is more or less linear. These studies are essentially qualitative and have been developed in the United Kingdom, Australia and Canada. The second current, which is associated with the diffusion of policy, deals with its simultaneous adoption, which may be related to clusters or regions, such as state reforms in Latin America or the adoption of economic systems based on markets and democratic regimes. The United States has a long history of studies that analyze public policy, which may be quantitative or qualitative in nature. The third current is the circulation of policy, which has to do with a broader movement in which policies travel in space and in time, becoming transformed during their voyage, and can return to their point of origin in a modified form. The “circulatory prism” is typical of the French debate (Vauchez 2013) and is characterized by qualitative methodologies.

The literature produced in the field of public policy analysis has received severe criticism from other fields which have examined this phenomenon recently, namely geography (Peck 2011), anthropology (Clarke et al. 2015) and urban planning (McCann and Ward 2011). Authors preoccupied with understanding the movement of public policies in these areas of knowledge have inserted themselves in this debate using a strategy of affirmation through negation, which has accompanied critiques of the first generation studies which have dealt with policy transfer policies in political science literature.

Jamie Peck (2011) is one of the authors who fits this description. In defending the idea of “policy mobility,” the author insists on limits to the approaches to “policy transfer” presenting it as something that belongs to political science, characterizing the literature as orthodox and marked by the rationality of its explanatory frameworks and decision-making processes, as well as of mechanic descriptions. According to Peck (2011) “in the political science literature, such analytical routines have enabled the continued elaboration of taxonomic frameworks, the aim of which is, apparently, to exhaustively classify the full range of empirically observed policy transfers” (p.779) and later the author states that “the attendant conception of the policy-making process tends to be highly mechanistic, and focused on the formal attributes (or underlying rationalities) of policies and programs” (p.780). His proposal is to present a new multidisciplinary approach affiliated with constructivism, which can capture “fast policy,” or in other words, the rapid

production of public policy based on models which circulate internationally, which assume that “policies are not, after all, merely being transferred over space; their form and their effects are transformed by these journeys, which also serve to remake continuously relational connections across the intensely variegated and dynamic socio-institutional landscape” (p.793).

In focusing his critique directly at transfer studies, this author just considers a portion of the debate, mainly the early studies which were important in putting this debate on the map in this field, and loses sight of later developments and more recent studies in this area, as well as completely ignoring the debate that is occurring in France, where they’re examining power relationships, context, culture, translations and other elements (Porto de Oliveira, Pimenta de Faria, 2017). The purpose of his critique in this sense seems to be to discourage a dialogue between different fields and create even more divisions between groups and researchers. In addition, this direct reproach has various flaws, the first being its anachronism in terms of the debate. The second is clearly reflected by the fact that the authors are writing from outside of the field, or in other words they haven’t accompanied the evolution of cases and new analytical proposals and combinations. The third refers to the lack of knowledge of a deeper debate, such as the circulation of policies, which for example already includes a number of elements presented by these critics.

This field needs greater dialogue between researchers and not the construction of a new antagonistic current. This article intends to make a contribution in this aspect, following the proposal of the “International Conference on Policy Diffusion and Development Circulation”<sup>2</sup>. It intends to identify the limits of the literature that has been produced up until now, which in fact has been concentrated on authors from research institutions in the North, who above all consider objects that circulate from the North to the South or between countries in the North. The idea is to present overlooked empirical elements and dynamics that have arisen in the South in recent years and which should be incorporated into the debate. New concepts and theories need to be created to access, interpret, describe and analyze this reality which can reflect a multidisciplinary and Southern approach.

## **2. Policy diffusion and development cooperation: The rise of the South in the policy transfer realm**

The processes for policy transfer to countries in the South have been influenced by at least three forces: the colonial legacy, the “importation of models” by elites, and cooperation in development. The Bretton Woods

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<sup>2</sup> Conference held at the Federal University of São Paulo, Brazil, 16-19 May, 2018: [www.policydiffusion.com](http://www.policydiffusion.com)

institutions, such as the IMF and the World Bank, played an important role in this process, especially in the beginning of the 1980s when they encouraged the adoption of their programs, models and public policies, as well as reforms of the State, through conditional mechanisms (Woods 2006, Weyland 2007). The OECD is another institution that has contributed in a significant manner to the diffusion of these models, through cooperation for development (Pal 2009)

In the new millennium, this scenario has begun to change and the countries of the South have taken on a greater role in policy diffusion. It's possible to understand that there was a kind of "critical juncture" which opened up the opportunity for this change. This "critical juncture" was made up of a combination of factors of an international nature and the trajectory of certain emerging economies, with the financial crisis of 2008, marking an important watershed. The crisis put the traditional donor countries in a challenging situation, and they reduced the volume and flow of financial resources devoted to cooperation for development.

As Mawdsley (2017, 11) puts it, the "material, ideational and ontological challenge of the non-DAC partners has coincided with the impacts of the 'global' and Eurozone financial crises in many donor countries, leading to mounting public and political pressure to reduce or redefine foreign aid". It was precisely at this time that a proposal was made that emerging countries should take on a greater leadership role in cooperation for development. In fact, the period coincided with the ascension of the BRICS (Brazil, Russia, India, China and South Africa). This interpellation was clear at the OECD's High Level Forum on Aid Effectiveness held in Busan (South Korea), where it was "the OECD-DAC donors who were doing the running in trying to persuade Brazil, India and, above all, China to come to the table; and who were willing to make very considerable concessions to ensure the semblance of a global agreement" (Mawdsley 2017, 111). Moreover, as Abdenur and Da Fonseca 2013 (p. 1477) argues in "the past few years there has been an overall reduction of Northern participation in the overall flows of development cooperation aid" and they follow stating that the "Southern cooperation providers' relatively robust performance within a context of crisis allowed them to further expand and diversify their cooperation ties".

From the domestic point of view, Brazil was progressively consolidating its social policies and becoming an international reference for many countries in various sectors. The most telling instance was at the G8 Forum in which President Obama commented that Lula was the most popular politician in the world. This was at a time when *The Economist* was also publishing cover stories alluding to the country's success. Brazil is in fact a kind of "Extreme West," as described by Alain Rouquié (1987), because it is a country that

belongs to the Global South, is situated in Latin America, and retains cultural and political characteristics whose roots can be identified through its relationship over the past two centuries with Europe and the United States.

Even though there was pressure for emerging countries to enter the chess of cooperation for development, these countries retained an important margin for action, which demonstrated that they had the power to negotiate and establish an ideological mark in this field. The cooperation entered into by Brazil, unlike the traditional form promoted by the OECD countries of the DAC, was not based on the investment of financial resources, but was rather based on the progressive transfer of ideas, knowledge and expertise in sectors of public policy within the country. Among the most important areas of investment and international cooperation were those that were part of the agenda of the Labor Party government, characterized by party innovations which had already been used to win the support of social movements, voters and important sectors of society.

The public policies developed by the Workers Party (PT) during the 1990s could trace their roots to what came to be called the “PT way of governing” (Bezerra 2015). This approach was a form of management oriented towards the deepening of social policies and the inclusion of the participation of society in determining public policy. The innovations that gained the most prominence during these Labor governments were the Participatory Budgeting, the *Bolsa Familia* (Family Allowance) Program and the National School Feeding Program. These three policies were important in terms of their transfer to other countries, whether based on subnational or national plans. However, the means that permitted their circulation are not addressed by the literature, because there needs to be an adjustment or conceptual innovation to understand these processes. In the next section, we will examine the different types of actors and instruments that emerged from this process, which differ from those which have appeared in the literature and which will enable us to advance in the elaboration of new concepts to analyze the phenomenon of policy diffusion.

### **3. Transfer agents and instruments**

The analysis of transfer agents is a classic element within the literature. The analytical framework created by Dolowitz and Marsh (2000) has already indicated a group of actors that could be involved in this process. To the authors, public policy actors such as “elected officials, bureaucrats, civil servants, institutions, consultants, think-tanks, transnational corporations and



supranational institutions” (Dolowitz e Marsh 2000, 9) can be involved in the policy transfer process. Diane Stone also devotes herself to the analysis of agents and focuses more extensively on the role of think-tanks (Stone 2001). Mintrom and Luetjens (2017), on the other hand, analyzes the role of “policy entrepreneurs”.

A large portion of the categories found in the literature are presented, on the one hand, as “native” entities, or in other words, are related to the common sense interpretation of the field, such as civil servants and elected officials, and on the other hand, they use concepts that have been consolidated in the area, such as the “political entrepreneurs” postulated by Kingdon (2011). The use of concepts such as these requires a revision to better capture the empirical phenomena that appear today, owing to the fact that the scenario in which public policy is determined has not only become more complex, it has also become highly international. The purpose of this section is precisely to show the empirical dynamics that occur in the policy transfer policies in countries in the South to improve these “native categories”, transforming them into concepts, in order to enhance our analytical potential. In this section, two new concepts will be developed to deal with actors, the “public policy ambassadors” and “policy transfer institutions.”

On the individual level, Dolowitz and Marsh (2000, p. 9) consider four types of actors: elected officials, bureaucrats, civil servants and consultants. In fact, transfer agents can occupy governmental positions or not, and the list can be extended to other actors such as researchers and professors, academics, NGO employees, journalists and so on. We would be oversimplifying if we were to say that these actors play a role as “policy entrepreneurs” when they participate in transfer processes. Observing the episodes and processes in the countries of the South, the dynamic appears to be more complex and we need to go beyond this category, in order to complement it and make it more accurate analytically. In qualifying human agency in policy transfer from the point of view of attributing the roles of actors in a previous work, the category of “Public Policy Ambassadors” was created (Porto de Oliveira 2017). This notion has been developed based on observations of promoters of the Brazilian PB on an international scale, and it has been confirmed with other public policies.

The experience of the diffusion of Brazilian policies is representative in this respect. Brazil, as mentioned before, has become an important locus for the production of social policy and has consolidated itself as a reference in this area. We can note as an initial landmark in this process for our analysis the democratization of the country in the middle of the 1980s and the Constitution of 1988. This “critical juncture” (MAHONEY 2000) made way for the reconstruction of the State and public policy in the years that followed. New leaders were elected democratically for positions in the legislative and executive branches on the municipal, state and federal levels. The governments that succeeded in the 1990s had to deal with social problems within a democratic context. Countless innovations arose, with some of them having been

conceived of by civil society during the military dictatorship and put into practice by the new elected governments after the transition to democracy.

The local level in Brazil was particularly fertile ground for social policy. Within this context, specialists became consolidated in various sectors such as social assistance, participative citizenship, and housing. An important part of these innovations was produced by the Labor Party, but these policies were not produced exclusively by this party. The Labor Party in the 1980s united leftist militants from unions, social movements, the Catholic church and other movements, who resisted the regime during the military dictatorship (Rodrigues 2009). With democracy, the PT won elections in important cities within the country (Abers 1996), which made way for the implementation of concrete innovations in public policy.

The PT's taking power in the municipalities was a step towards involving those who had taken part in its formation in the handling of public policy, together with other people who were close to the party. The materialization of the PT and the translation of the "PT way of governing" into concrete public policies contributed to the emergence of specialists in these sectors during the 1990s. In addition, the strong connection with social causes produced, often in these same actors, a combination of professional activity and personal identity. In 1989, the first PB was created in Porto Alegre, which included citizens in the deliberation process for determining the government's budget.

Beginning with the new millennium, part of the policies espoused by the Labor Party migrated to the federal level with the PT's gaining of power in 2003, together with the specialists who had accompanied them on the municipal level. Social policy was transferred not just on a scale which facilitated learning on a domestic level, but also became part of the country's internationalization strategy. Brazil, in becoming an important figure as the representative of countries of the South, sent these specialists abroad. This occurred because there began to be a demand for these specialists among international institutions and thus they circulated internationally. These ambassadors of public policy advocated using the social policy instruments that they had developed in Brazil on a regional scale, and Latin America is fertile ground for this due to its proximity and Brazil's leadership strategy in the region. Africa was the next destination, due to the strategic relations established by Brazil, which can be seen by the 19 embassies opened by PT and the high number of trips that Lula took to this continent.

This process helped to consolidate, on one hand, two types of agents, and on the other, distinct instruments designed to spread ideas, knowledge and political institutions internationally. These agents are the "ambassadors of public policy" and the "transfer institutions," while the instruments will be treated as "transfer instruments." In the following sections, we will discuss these three elements.

### ***The human agency on transfers and the role of policy ambassadors***

Public policy ambassadors are important to legitimize certain instruments which are the most appropriate to resolve certain social problems. This category is different from “policy entrepreneurs,” because these actors are in fact specialized in terms of a policy or a group of instruments for one type of program and act over the long term, frequently during their entire careers in this sector. Policy entrepreneurs act in a sporadic manner, and are cold and calculating.

The lens focused on these actors shows their individual agency as policy ambassadors, but there are many of them who are specialists in the sectors that they operate in. Looking from a somewhat greater distance at these actors, we can perceive groups or clusters of policy ambassadors who advocate the use of similar instruments for solving public problems, whether it is in terms of social participation, conditional cash transfers or the acquisition of food for school lunch programs. These agents are operating in the domestic and international sphere, defending and legitimizing their own specialty instruments. This type of actor Howlett, Ramesh, and Saguin (2018) denominate, using another term, as “instrument constituencies.” They are not made up of just Brazilians, but through the diffusion of these policies and through the endorsement of parts of these international organizations, there appear cosmopolitan and transnational actors from various countries specialized in specific regions, who operate in various public, private, governmental and non-governmental institutions.

An example of these policy instruments, which illustrates the actions of these “ambassadors” is the National School Feeding Program (PNAE). Having existed since 1955, the PNAE is the oldest Brazilian food program, and it was redesigned during the first PT administration. What was innovative about it was that it established a school lunch as a basic right of public education and formed a relationship between school food and family agriculture, which becomes the supplier and comes to constitute an institutional market of the government (Graziano, Grossi, França, 2010). The idea behind the program is to articulate a virtuous cycle which links production to consumption, including the food safety component, which thus produces in this manner a market stimulated by the government.

The case of the PNAE is an interesting example of a low-cost policy that has a great impact in terms of improving the social situation of those in poverty conditions. The actions of public policy ambassadors were important to including this idea in Brazil’s international agenda and that of other institutions such as the FAO, for example. Two “ambassadors” were of greatest importance in this context, then President Lula and the director general of the FAO.

The foreign policy of Lula’s government was marked by presidential diplomacy. The president made thirty-three trips to Africa, visiting twenty-six countries during his eight years in office. A charismatic leader, Lula represented

the ascension of an emerging nation to the world, as a worker who had managed to be elected president. Considered the only African leader outside of the region, in his speeches Lula emphasized the achievements of Brazilian social policies, with one of them being the PNAE.<sup>3</sup> The modus operandi of spreading these policies was based on the personality of the president and his actions consisted of organizing meetings through the federal government during his mandate and later through the Lula Institute. In his trips, the ex-president gave talks and had meetings with chiefs of state to present the Brazilian experience. According to one of our interviewees

“We handled invitations and organized events here and there [in Africa] in which we presented our experience [...]. We organized trips; Lula was in Angola last year and held a large seminar about the family stipend for more than 800 people.”<sup>4</sup>

The role of Lula was to legitimize and promote the Brazilian experience and one can perceive his role more clearly when the interviewee states that

“We have a brand named Lula. Today Lula continues to be a major African leader outside of Africa. When he travels to Africa he is received by any head of state as if he were still the president of the republic. And he is a very strong reference in that continent and is seen by most African governments as a strong source of contacts, knowledge and solidarity.”<sup>5</sup>

On another scale and acting in a different manner, the Director General of the FAO José Graziano was also important in diffusing a group of specific programs regarding food safety and the acquisition of food. According to our interviewee

“Zé Graziano da Silva was one of the creators of the Zero Hunger Program, was one of Lula’s old comrades in arms, and he’s now the director general of the FAO [...] he treated the issue of a lack of food safety in Africa as an axis of his actions [...]. In this aspect [the diffusion of food safety programs], the FAO is fundamental.”<sup>6</sup>

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<sup>3</sup> Interview with a Lula Institute employee in São Paulo, 2015.

<sup>4</sup> Interview with a Lula Institute employee in São Paulo, 2015.

<sup>5</sup> Interview with a Lula Institute employee in São Paulo, 2015.

<sup>6</sup> Interview with a Lula Institute employee in São Paulo, 2015.

The circulation of Graziano and academia for social policy, as well as the sphere of international organizations, is important and reveals that this actor promotes a group of political ideas, independent of the institution in which he works. In another interview, you can see that the experience of Graziano and his ideas entered and became part of the agenda of this international organization.

“One of the things that the new management has brought with it, **the management of Professor Graziano** has brought with it is something that makes use of his experience, an experience which has been quite successful in Brazil in recent years, which is that you need to have a series of public policies to succeed in ending hunger, it’s not just a question of producing food. For some time Brazil has had more than enough food to sustain its entire population, but at the same time there is a large hunger problem and it was these public policies that managed to create the situation we have today in which a [...] significant percentage of the population is suffering from hunger. And this is something, it’s a message that he [Graziano] repeats often [...] every opportunity he gets, he [...] reminds people that it’s possible, it’s not a dream, and that this is what we should do and tells us exactly how we should go about it. [He] refers a lot to the idea that this could be the zero hunger generation, the generation that will see hunger vanish. This is to the extent that countries begin to adopt public policies that give the population access to food, which include a series of factors involving the capacity to provide physical access to food, its distribution, having food delivered to those who need it, arriving at markets, all the way to the capacity of a person to buy food [...]. Finally one of the most interesting areas that’s being developed with this work, because there is an enormous interest on the part of countries that wish to **emulate this successful experience in Brazil, is the area of Food Acquisition being associated with School Lunches**. This has always been one of the two central axes of the Zero Hunger Program, of the Family Stipend in Brazil and, finally, there are various countries which are in fact adopting some type of similar program or a program adapted to the country’s own experiences and internal realities. And we can see that this has in fact brought about change [Our highlights].<sup>7</sup>

It can be understood that José Graziano believes that to end hunger one has to create public policies devoted to systematically dealing with this issue, as has been done in Brazil. The PNAE is explicitly mentioned in the interview. The PNAE is the object of two projects concerning school lunches as a form of trilateral cooperation between Brazil, country partners and the FAO, which is the executing institution of the National Fund for Educational Development (FNDE), with its instruments for public action being transferred to various countries.

Both actors are examples of different types of “public policy ambassadors.” They are actors who have emerged within the Brazilian context

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<sup>7</sup> Interview conducted with an employee of the FAO in Rome, 2015.

of innovation in social policies and have taken on international prominence. Nevertheless, these “ambassadors” do not act in an independent manner. There are institutions which support this process as we’ll see in the following section.

### ***Institutional transfer agents***

The Brazilian example demonstrates that it is also important to have state institutions of various kinds involved in the transfer of public policies. These institutions can operate in a coordinated fashion with the Ministry of Foreign Relations and with the Brazilian Cooperation Agency (ABC). The ABC works with 84 national institutions (Milani 2017, 62). However, these institutions also possess their own ideas and interests and have developed a group of autonomous initiatives. They include institutions such as Ministries (Health, Social Development, Education) government research agencies (Embrapa and Fiocruz), public banks (Caixa Econômica Federal) and subnational governments (such as the cities of Porto Alegre, Guarulhos and the State of São Paulo) and arms of international organizations devoted to the transfer of ideas, techniques and knowledge (such as the Center of Excellence against Hunger).

We will denote these actors as “institutional transfer agents,” because they are defined as governmental institutions whose work includes the diffusion of sector policies in their areas of operation and expertise. These institutions have created specific sectors to operate internationally – as consultants, secretariats, coordinators and directorates of international relations. In these bodies there are personnel devoted to performing these tasks who possess technical knowledge. These institutions possess funds or raise funds for each of their actions and operate in an independent manner, sometimes in collaboration with other government bodies – such as the ABC mentioned above – and other bodies that compete with them.<sup>8</sup> They are not necessarily in political and ideological harmony with the other “institutional transfer agents” or the central government.

These institutions have recently created international relations structures such as secretariats, consulting and coordinating departments to help the processes of internationalization. Part of their activities have come to include the transfer of technology and sector knowledge to other countries. The Ministry of Social Development and the Fight against Hunger (MDS), for example, has a Directorate of International Projects, through which it develops projects with three agencies of the United Nations (FAO, UNDP and UNESCO) and various

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<sup>8</sup> Reports from participants in the workshop “Difusão de Políticas e .... (Diffusion of Policies and...”, Enap

countries, and there have been cooperation agreements established with more than 60 countries. The MDS projects are related to the formulation, execution, evaluation and monitoring of policies designed to fight poverty and improve social development.<sup>9</sup> In addition, the MDS welcomes countless country delegations which have an interest in getting to know more about, and receive training related to, certain instruments of public actions in this sector. To give an example, between 2011 and 2015 the MDS received more than 400 delegations, from 97 countries.<sup>10</sup> The growth of these institutions within these Ministries is occurring at the same time as Brazil is raising its international profile and there is a “branding” of Brazilian public policies, on one hand, and, on the other, there is interest from other countries in the policy innovations that have been produced within the Brazilian context. International institutions such as the World Bank, for example, recommend that various countries learn from Brazil’s example, as occurred in the conditional cash transfer program created in the Philippines (Howlett, Ramesh, and Saguin 2018). One of those interviewed describes this process in the following manner

At the same time we [the Lula Institute] receive delegations [...], in recent years this has been a phenomenon, in which many African governmental and technical delegations have come to Brazil to learn more about our social programs. They go to Brasília and are received by the Brazilian ministries, above all the MDS.<sup>11</sup>

On the subnational level, since the 1990s institutions have been structured, especially in the cities, to assist and coordinate the international relations of municipalities. Among their international activities is fundraising to improve the infrastructure of these cities, to organize events, establish political networks and transfer policies. The first structure of this nature was created in Porto Alegre in the middle of the 1990s (Marx 2008). The international activities of Porto Alegre, which was governed by the PT, were mainly motivated by the desire to create an alternative political space to the proposals made by the federal government, whose political orientation at the time was similar to neoliberalism. The city of Porto Alegre became involved in international relations in a manner that was independent of the Foreign Ministry and structured relations with other cities, producing informal networks – which progressively became structured – like Mercocidades which will be presented in the following section, and the network of the Forum of Local Authorities for Social Inclusion and Participative Democracy. These networks constituted an important locus for policy transfer between cities, “exporting” their urban management practices (Porto de Oliveira 2017).

The states of Brazil have also followed similar initiatives. In recent years the government of the State of São Paulo has become one of the most important subnational actors in international relations. In this case, there was also ideological competition between the state and federal governments in relation to the political orientation of the Foreign Ministry, since the federal government was under the control of the PT and the state government was under the control of the Social Democratic Party (PSDB). The government of

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<sup>9</sup> <http://mds.gov.br/aceso-a-informacao/institucional/internacional>, consulted on June 5, 2018.

<sup>10</sup> Interview, former staff from the MDS, Campinas, 2016.

<sup>11</sup> Interview with a Lula Institute employee in São Paulo, 2015.

the State of São Paulo created a consulting department linked to the governor's cabinet to assist in international relations issues.<sup>12</sup> The state government through this consulting area, sought to transfer public policy instruments abroad. An example of this is a project with the Indian Consulate in São Paulo, one of the cities with the highest incidence of violence in Latin America, in which Indian meditation techniques were used in prisons to improve the conditions for the prisoners. In the next section, we will put more emphasis on the role of paradiplomacy as a transfer instrument.

There is a third group of "institutional transfer agents," which consists of the institutions created as arms of international organizations, structured in partnership with Brazilian governmental bodies. These institutions have arisen in recent years in Brazil, with the three most significant of them being: The Rio + Center and the International Policy Center for Inclusive Growth (IPC-IG) both linked to the United Nations Development Program (UNDP), and the Center of Excellence against Hunger (CEH), an organization linked to the United Nations' World Food Program (WFP), which will be presented in this paper.

The WFP is a global initiative managed by the United Nations. The program was founded in 1961 with the mission of distributing food to nations in crisis situations. In Brazil, the CEH was created in 2011 through a partnership between the government and the WFP. The role of the CEH is to act as a hub for the exchange and sharing of experiences, knowledge and technology in the school lunch sector and related areas. Among the activities that the CEH performs are: technical training, consulting, research and advocacy. More specifically, this is a center that works directly with the transfer of school lunch policy ideas, techniques and instruments (Porto de Oliveira, 2015).

The center receives various delegations and has missions in many countries, with Africa being one of the main regions. According to one of our interviewees, school lunch programs are not the only interest of these delegations from other countries, which often come to Brazil interested in a combination of social policies. This combination involves the Family Stipend Program (PBF), health programs and other social protection programs. Kenya is a special case in this regard. The role of the WFP in Kenya has traditionally been to receive food and distribute it throughout the country, especially regions characterized by low nutrition and poverty, located further away from the capital. There was a WFP initiative based in the UN headquarters in Nairobi (one of this institution's headquarters) to change the orientation of this work and introduce a food safety dimension and incentives to acquire food on the part of the Kenyan government, along the lines of the PNAE.<sup>13</sup> However, the government displayed great resistance to this, because it would mean allocating resources to a new program. In 2016, the MDS, with help from the CEH, organized the *11<sup>th</sup> International Seminar on Social Policies for Development* in Brasília, featuring

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<sup>12</sup> Field visit, International Relations department, State of São Paulo government, São Paulo, 2017.

<sup>13</sup> Interview, World Food Program Staff, Nairobi, 2017.



the participation of roughly 240 people from 66 countries, including governmental delegations and embassy representatives.<sup>14</sup> On this occasion, the CEH supported the participation of 11 countries (Burkina Faso, Colombia, Cuba, Ethiopia, Gambia, Kenya, Morocco, Mozambique, Panama and Peru).<sup>15</sup>

According to one of the representatives of the WFP in Nairobi, it was on this occasion that the Kenyan government took notice of the need for a transition to food safety policies. Among the strategies used to persuade governments to adopt food safety programs is emphasizing that they produce results that have a visible social impact.<sup>16</sup> This makes it possible for a politician to leave a legacy and be recognized as the author of a notable policy in his or her country and not just a regular manager. In the case of Brazil, for example, during the Labor Party administration, the country left the Hunger Map. A visit to Brazil by Kenyan politicians provided them with direct contact with CEH managers and employees, and enabled them to observe food programs in this country, and it was instrumental in convincing them to adopt the program.<sup>17</sup> Next the CEH became the key actor in transferring knowledge about these school lunch programs and driving Kenya's transition from a food distribution system to a food safety policy inspired by the Brazilian model.

### ***Transfer Instruments:***

The literature of this area has been dedicated to understanding processes (Hadjiisky, Pal, Walker, 2017), mechanisms (Peck 2011) and transfer agents (Stone 2001, 2008; Porto de Oliveira 2017; Howlett, Ramesh, and Saguin 2018; Mintrom and Luetjens 2017). Research articles have also considered instruments *per se* (Béland, Howlett, and Mukherjee 2018; Delpuech 2009), or in other words, the policies that circulate. However, not much research has been done on the instruments by which these policies circulate. The studies of Europeanization are exceptions in that they have realized important analyses in relation to regional governance and its instruments (Saurugger and Surel 2006; Radaelli 2008; Halpern, Galès, and Bart 2011). There is still a lack of research in this field about “transfer instruments” related to cases of South-South and South-North circulation. It's necessary to not only observe the mechanisms which facilitate the transfer process – coercion, emulation, competition and learning – but also examine the role of instruments, both formal and informal, which enable policies to travel in terms of time and space.

An instrument of public action consists of, according to Halpern, Lascoumes and Le Galès (2014), a “device that is technical and social at the

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<sup>14</sup> <http://mds.gov.br/area-de-imprensa/noticias/2016/maio/brasil-apresenta-politicas-sociais-a-representantes-de-66-paises>, consulted on June 12, 2018.

<sup>15</sup> <https://nacoesunidas.org/seminario-em-brasilia-discute-politicas-sociais-e-de-desenvolvimento/>, consulted on June 12, 2018.

<sup>16</sup> Informal conversations, during a field visit to the CEH in Brasilia.

<sup>17</sup> Interview in Nairobi.

same time that organizes specific social relationships between public power and its constituents in function of the representations and significance that they carry” (our translation). More precisely, an instrument can be considered to be “a specific type of institution, which affects the evolution of the actors’ behaviors and representations; their choice is neither neutral nor systematic.” In terms of the diffusion of policies (outside of the context of the European Union) there are different instruments that can be established in order for transfers to occur, which can vary and be configured according to formal cooperation agreements, memoranda of understanding, the creation of platforms and networks, and even technical learning visits, as we’ve seen in the case of the CEH above.

Based on these elements, we can define “public policy transfer instruments” in the following manner: *a type of specific device, more or less formalized, through which public policy transfers are operationalized; this device has both a technical and social character, in the sense that it is not only a transfer tool, but it also carries with it an abstract and cognitive connotation or one that refers to the political project that these actors are implementing. The type of transfer instrument also reveals the power relationships between the parties, which will influence their behavior during the duration of the process.*

Among the instruments used for transfers related to countries of the South, we can include agreements established by institutions like the World Bank, which have often been used since the 1980s and involve conditional clauses, international cooperation programs between the European Union and the countries of Latin America, which were popular in the 1990s and the first decade of this millennium (Weyland, 2006; Woods, 2006), as well as projects by foundations like the Ford Foundation including the Rockefeller Foundation’s recent “100 Resilient Cities” program. In the context of informal instruments, the creation of networks for exchanging experiences and organizing events has been a very successful strategy, especially on the subnational level.

The analysis of the Brazilian case shows that policy transfers are operationalized through international cooperation, both formal and informal, which can be directed in a centralized fashion, with support from the ABC, or decentralized, such as the direct action of subnational governments. The process of consolidation of decentralized cooperation in the Brazilian case provides important examples of learning and diffusion instruments, such as the Mercocidades network and the URB-AL program.

The Mercocidades network is a process that was created by the leadership of the city of Porto Alegre, within the context of Mercosul. Created in principle as an informal network which calls for greater participation on the part of subnational governments in the regional integration process, the network has also been progressively constituted as a platform for the exchange of practices in urban management. The founding members shared progressive ideas and touted the idea that the collateral effects of economic integration, marked by neoliberal leadership in the countries participating in Mercosul, would be felt more intensely in cities. This was because, when all else failed, social problems

due to regional integration processes would end up being resolved by mayors. However, political actors did not participate in the regional integration process.

The purpose of the network was to apply pressure to include their voices in this process. Initiated in conjunction with a few cities, this network used the organization of meetings as a one of its ways to coordinate and work. In these meetings, the member cities were given space to present their urban management practices.<sup>18</sup> The links between certain municipalities and their respective employees, politicians and organizations intensified through this type of relationship. This was a fertile space for policy transfer such as the Participatory Budget. Over the years this network has increased its membership, becoming more and more formalized. Within the context of decentralized cooperation, cities in other networks have also consolidated themselves as important loci of policy transfer. United Cities and Local Governments,<sup>19</sup> for example, currently offers peer-to-peer learning programs, and the Metropolis network presents an exclusive platform dedicated to the transfer of “best practices.”<sup>20</sup>

The informal element of the network’s origins, its political project shared by these actors, the strategy of resisting a broader process like Mercosul, and the dynamics of cooperation, which involve solidarity and the exchange of experiences, are distinctive elements of this type of “transfer instrument,” which reveal not only material aspects but also abstract aspects of this device. City networks similar to Mercocidades were typical in Latin America during the period from 1990 to 2010. In turn, more formalized cooperation programs also existed at the time, such as the URB-AL program, which sought to promote the sharing of management practices in various areas among cities in Europe and Latin America, financed by the European Union and the Latin American cities involved.

The program was divided into areas, and featured a city with recognized expertise as the leader and sub-networks of cooperation projects among a broader group of cities. The project was made up of distinct phases and defined themes, and cities could apply to be project leaders through specific competitions. In these instances, the process was more formalized and involved the approval of the European Union. The project resulted in the creation of distinctive city networks and transfers between various levels of urban policy, such as small technical program components. Moreover, the URB-AL program was a catalyst for creating international relations institutions in many cities throughout Brazil. In fact, to deal with the development of projects, international partners, the receipt of resources, presenting accounts and other related activities, the municipal governments needed an appropriate structure. Thus, it became necessary to create consulting and coordinating departments as well as secretariats for international relations in these cities, as was the case with

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<sup>18</sup> Interview, Former Mayor of Porto Alegre, Porto Alegre, 2011.

<sup>19</sup> Interview, United Cities and Local Governments staff, Quito, 2016.

<sup>20</sup> <https://policytransfer.metropolis.org>, consulted on June 14, 2018.

the municipality of Belo Horizonte.<sup>21</sup> More than this, the program induced the construction of subnational expertise to deal with international issues, as well as transfer knowledge and best practices.

Beginning in the middle of the 1990s, the Foreign Ministry sought to coordinate this paradiplomacy and organize the international actions of subnational governments, such as the institutionalization strategy of “federative diplomacy” (Miklos 2011). This initiative gained force in the beginning of the millennium and became an instrument of policy transfer with the participation of the ABC, which beginning in 2011 began to finance Franco-Brazilian projects of trilateral decentralized cooperation with Haiti and African countries. Among these case studies of support, the municipal government of Guarulhos was contemplated for a knowledge transfer project in the area of solid waste management in partnership with the agglomerated community of Seine-Saint-Denis, France and the municipalities of Maputo and Matola, Mozambique. The project functioned based on missions of African delegations coming to Brazil to obtain knowledge and education, and the holding of training workshops in Mozambique.<sup>22</sup> Despite the structuring and financing of cooperation, it remained subordinate to progressive political projects, especially within the context of relations between Guarulhos and Seine-Saint-Denis. Guarulhos was effectively governed at the time by a mayor of the Labor Party, while Seine-Saint-Denis is a region that has long been marked by the presence of the French Communist Party.

On the subnational level there are some power disputes in relation to the leadership of these policy transfer processes as well as political projects which are also presented during these processes. These instruments may be formal or informal.

## Conclusion

In this paper it was insisted on the need for new insights from Southern empirical experiences in order to innovate on policy transfer and learning research. It is argued that it is important to improve dialogue among researchers from different research backgrounds, as well working with empirical cases from distinct regions and levels in order to improve the debate. The main purpose was to bring into light three new elements to understand public policy learning and transfer, the human agency, the institutional agency and the means by which ideas and models travels among countries. The case of Brazil was used as an example of new dynamics of this phenomenon. In this article it was presented the notions of “policy ambassador”, “institutional transfer agent”

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<sup>21</sup> Interview, International Relations staff of the Municipality of in Belo Horizonte, Belo Horizonte, 2013.

<sup>22</sup> Technical agreement, available at <https://pastel.diplomatie.gouv.fr/cncdext/dyn/public/atlas/detailProjet.html?criteres.prjId=6291>, consulted on June 14, 2018.

and “transfer instruments”. These are important concepts to update or improve existing categories in the area of policy studies.

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Policy transfer research has its roots in comparative policy analysis in the US (Bulmer et al., 2007; Dolowitz and Marsh, 1996). Authors first became interested in the diffusion of policy innovations within and between particular federal states and cities (Walker, 1969). However, this approach was itself criticised for ignoring the multiplicity of transfer processes associated with diffusion activities (Dolowitz and Marsh, 1996).  
Political Studies Review © 2011 Political Studies Association. Learning from policy transfer research. 367. 1991). However, lesson drawing research was itself criticised for its "implicit assumptions" that the drawing process was both rational and voluntary (Bulmer et al., 2007, p. 13). What makes transfer learning different? In the following, we will look at the factors that -- in our opinion -- motivate Ng's prognosis and outline the reasons why just now is the time to pay attention to transfer learning. Transfer learning can help us deal with these novel scenarios and is necessary for production-scale use of machine learning that goes beyond tasks and domains where labeled data is plentiful. So far, we have applied our models to the tasks and domains that -- while impactful -- are the low-hanging fruits in terms of data availability. To also serve the long tail of the distribution, we must learn to transfer the knowledge we have acquired to new tasks and domains.  
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