1. A prelude to policy transfer research

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INTRODUCTION

In the past decades a fast-growing movement of public policies crossing borders has emerged, bringing new dynamics to public policymaking. A tipping-point was set with the fall of the Berlin Wall, when policies would no longer circulate inside the closed circuits of each bloc. Instead, policies could flow more freely and globalization increased these movements in at least two directions. On the one hand, the progressive engagement of governments (both national and subnational) in the internationalization of domestic policies has been notable. In fact, promoting “best practices” abroad, often via formal and informal cooperation projects, has been a constant action of governments around the world. On the other hand, the production of global agendas, standards and goals by international organizations and transnational actors in the international community (such as the Sustainable Development Goals and the New Urban Agenda), has compelled governments at different levels to implement new practices and standards. To tackle this reality, scholars have produced innovative concepts, strategies, and frameworks to analyze, *inter alia*, the agents, process, dynamics, and results of policies “traveling” around the globe, building a new area of research in policy studies.

With the benefit of such “empirical imposition”, brought about by the globalization of public policies, this field of knowledge known in public policy analysis as “policy transfer research” – which includes different variations, as will be explained in the next section – was consolidated in recent years. Attempting to understand how, what, when, and under which circumstances policies travel and the effects of this movement, the literature informs us that policy transfers occur in many different ways (Dolowitz and Marsh, 2000; Hadjiisky et al., 2017; Porto de Oliveira and Pal, 2018). In a nutshell, policy transfers involve a plethora of agents (Dunlop, 2009; Laidi, 2005; Pal, 2012; Stone, 2001), with diverse narratives (Cabral et al., 2013), operating in multiple arenas (Baker and Walker, 2019; Porto de Oliveira and Pal, 2018), with unequal power relationships (Dolowitz et al., 2020b), following different directions (Osorio Gonnet, 2019) and geographies (Milhorange, 2018), with distinct time intensities (Peck and Theodore, 2015; Wood, 2015a), generating heterogeneous effects and transformations, as assemblages (Clarke et al., 2015; McCann and Ward, 2011), bricolages (Stone, 2017), or translations (Hassenteufel et al., 2017).

Policy transfer research has had a profound impact on public policy analysis. The generations of studies on policy transfers helped to overcome various barriers in the field. First, it was important to move beyond the domestic/international and the grip of methodological nationalism (Stone, 2008; Wimmer and Glick Schiller, 2002), with the prejudice that public policies are related to domestic issues, and international relations is the field concerned with foreign issues. As societal problems rarely respect state frontiers, solutions for these in terms of public policy transfer follow, and policy transfer analysis needs to consider policies moving transnationally. A key example is the cross-country rapid adoption and adaptation of policy solutions to prevent and react to the Coronavirus (COVID-19) outbreak. Second, analyzing

policy transfers requires bringing to the discussion the “Galton problem” (Braun and Gilardi, 2006; Jahn, 2006; Ross and Homer, 1976). This “problem” is outlined below but in essence, represents a methodological quandary in establishing the balance between international and domestic variables in the explanation of public policymaking. Third, this movement naturally connects international relations studies with public policy analysis, opening the door to sharing issues, concepts, and methods of research, as well as to the analysis of international and global public policies (Coleman, 2012; Petiteville and Smith, 2006; Stone and Moloney, 2019).

The fourth barrier is the inclusion of transnational dynamics into comparative public policy analysis (Porto de Oliveira, 2020a). In fact, policy transfer research induced analysts not only to move from conventional cross-national comparisons to transnational comparisons (Hassenteufel, 2005) – which includes the observation of the transnational process of policies moving across borders – but also to the idea of comparing the outcome of a policy transfer with its origins elsewhere (see Jennifer Robinson, Chapter 6 in this volume). The fifth point is related to the openness of policy transfer research to other disciplines such as history and geography, which leads researchers from the field of political science to rethink the conception of territory. Such disciplinary insights do not necessarily require political scientists and policy scholars to think in terms of hard boundaries of state jurisdiction but more fluid and porous boundaries and scales of governance. Finally, policy transfer analysis can be an important source of information for practitioners and public policymakers, who are in constant search of policy models from elsewhere, to solve their public problems and can benefit from high-quality information about the challenges of transferring a policy, as well as what works, when, and how.

There are already many different articles, edited volumes, and thematic special issues about policy transfer research available in the literature (Dolowitz and Marsh, 2000; Evans, 2009; Hadjiisky et al., 2017; Porto de Oliveira and Pimenta de Faria, 2017). However, we hope here to provide a more profound overview of the area. The challenge of this Handbook is to overcome ontological and epistemological cleavages that exists in the area and foster a more coordinated dialogue, focused on improving the quality of our understanding of the “policies traveling” phenomenon. This task was accomplished by bringing together different scholars in different venues such as the annual Conferences of the International Public Policy Association (2015, 2017, and 2019) and the International Conference on Policy Diffusion and Development Cooperation² (2016 and 2018), held in São Paulo, along with specific workshops in the area. The *raison d’être* of this volume is to be the first Handbook that tackles some of the most important issues, concepts and analytical strategies of policy transfer diffusion, circulation and mobilities research. The objective of this work is to provide a scholarly state-of-the-art of the field with a comprehensive and consistent approach – which will be presented in this introduction – that brings together chapters covering not only classical debates, but also emerging research agendas with new and fresh perspectives for the area.

This introduction is organized in four sections. The first presents the main discussions around the streams of research. The second outlines the main dynamics of policy transfers. The third provides an overview of the frontiers of knowledge in the area. The final section concludes and presents the organization of the Handbook.

1. POLICY TRANSFER, DIFFUSION, CIRCULATION, AND MOBILITIES

Policy transfers have occurred throughout political history. The list of examples is extensive. To mention a few of the most prominent, we can trace the spread of democratic political ideas and practices back to ancient Greece; the state and its institutions since Westphalia (1648); and modern social security policies from Bismarck onwards (in the nineteenth century), among others. However, it was only more recently with the development of disciplines such as political science, public policy analysis, and international relations that this phenomenon gained attention and started to be studied more meticulously. In public policy analysis, the roots of policy diffusion analysis in contemporary political science can be found in pioneering investigations such as Jack Walker's (1969) study of the adoption of innovations in the context of the United States intra-federalism, as well as Everett Rogers' seminal work on the diffusion of innovations (Rogers, 2003).

The proliferation of studies and publications led the field to a terminological morass. For example, by 2013 there were as many as 104 identified terms associated with the policy diffusion process (Graham et al., 2013). This situation revealed the significant fragmentation of the field. In spite of this, we can distinguish four main research traditions in the debate today: policy transfer, policy diffusion, policy circulation, and policy mobilities (Porto de Oliveira et al., 2020; Porto de Oliveira and Pimenta de Faria, 2017). These streams represent different ontological and epistemological priorities, which are not necessarily all mutually exclusive, but as we argue here can be complementary and offer the possibility of a holistic approach to policy transfer.³

The first stream is **policy diffusion**, a phenomenon that “occurs when government policy decisions in a given country are systematically conditioned by prior policy choices made in other countries (sometimes mediated by the behavior of international organizations or private actors and organizations)” (Simmons et al., 2010, p. 7). One of the main issues of this stream is related to the “Galton problem”, that is, the idea that domestic institutions (or government traits, behaviors, and so on) might not be shaped exclusively by domestic dynamics, but also reflect the influence of international diffusion (see Ross and Homer, 1976). Policy diffusion research assumes that policy choices of governments are interdependent and studies focus on the characteristics and consequences of such processes (Braun and Gilardi, 2006). Studies are *grosso modo* characterized by quantitative analysis, with large-N, where understanding the causal mechanisms of diffusion is a core characteristic (see Chapter 3 by Johanna Kuhlmann in this volume), often tending to emphasize structural explanations (Marsh and Sharman, 2009).⁴ Policy diffusion scholarship is popular in American political science (see Brooks, 2004; Karch, 2006; Linos, 2013; Simmons et al., 2010; Sugiyama, 2012; Weyland, 2006), with important exponents in Europe as well (Francesco, 2013; Gilardi, 2016; Levi-Faur and Jordana, 2005).

In the 1990s a group of scholars from the field of public policy analysis emerged that were interested in the process of international policy learning and cross-national governmental response to similar problems (Rose, 1991). An issue of the *Journal of Public Policy* was dedicated to “lesson-drawing” in 1991.⁵ In this issue, Richard Rose criticized the policy diffusion approach proposing that instead of focusing on the patterns, the technocratic dimension and the sequence of policy adoption in different countries, studies should pay more attention to the policy solution itself, the political and normative facet and the processes of searching and

transferring a model. He argued that “diffusion literature concentrates principally upon the attributes of those who adopt new measures sooner or later, and upon the pattern of diffusion”, diffusion studies also “assume that not only are there common problems but also a common response, regardless of partisan values or political culture” (Rose, 1991, p. 9).

A few years later, in 1996, David Dolowitz and David Marsh developed the concept of **policy transfer** in a literature review of the area (Dolowitz and Marsh, 1996) and in 2000 in an issue of *Governance* dedicated to this subject, Dolowitz and Marsh, following the insights of lesson-drawing, designed an analytical framework and popularized the concept of “policy-transfer” (Dolowitz and Marsh, 2000).⁶ The Dolowitz and Marsh model assumed that policy transfer ranged along a continuum of voluntary and coercive adoption and that policy transfer could be analyzed as a dependent or independent variable. Their model focused on the examination of seven elements: the reason for engaging in policy transfer, the agents involved in the process, the object transferred, the origin of lessons-drawn, the degree of transfer, the restriction and facilitations of transfers, and the impact of transfer in policy success and failure (Dolowitz and Marsh, 2000, p. 8). This article represented a turning point in the discussion and would inspire scholars for more than a decade.⁷ They were the cartographers of the field, as Hadjiisky, Pal and Walker (2017) put it, and brought to the discussion a set of questions, the agents, and the dynamics of such processes.

A literature on policy transfer emerged that was characterized by case studies and small-N comparisons, with the use of qualitative methods. Studies addressed specific questions such as the role of the different transfer agents (Laidi, 2005; Nay, 2010; Porto de Oliveira, 2010; Stone, 2008), the relation with policy learning (Dolowitz, 2017; Dunlop, 2009; Evans, 2009), its relation with globalization (Bissessar, 2002), and the micro- and macro-dynamics (Hadjiisky et al., 2017), among other issues. It’s worth noting that with the evolution of the European Union, a specific literature arose to address policy transfer issues in the regional integration process (Bulmer et al., 2007; Radaelli, 2008; see also Chapter 17 by Coman and Tulmets in this volume). The most recent publications in the area address the dimension of time (Dolowitz et al., 2020b) and development (Stone et al., 2020), which can be considered among the current frontiers of knowledge in the area, as will be discussed in detail in section 3 of this introduction.

The notion of **policy circulation** is associated with French scholarship and remained in a certain way restricted to the Francophone and Francophile community of scholars. In the 1990s, studies in comparative politics started to address this issue of policies traveling internationally, with particular concern towards the “import/export” of state institutions between the West and African countries. Such pioneering studies were devoted to understanding the international flow of state institutions in the context of decolonization (Badie, 1992), the historical and cultural dimension and the reappropriation of such models (Bayart, 1996), and the dynamics of transplant and rejection of institutions (Mény, 1993). Later, in the early 2000s, French policy analysis relied on policy transfer concepts to understand the Europeanization process (Saurugger and Surel, 2006) and renew the discussion on comparative analysis, bringing in the idea of “transnational comparison” (Hassenteufel, 2005). But the concept of policy transfer began to be problematized (Dumoulin and Saurugger, 2010) and a number of scholars began to refer to the notion of “circulation” (Delpeuch, 2009; Vauchez, 2013). In fact, the idea of circulation – which is still not dominant among French scholars (Hadjiisky et al., forthcoming) – captures a movement that is not linear, direct, and fluid, as presented by policy diffusion and transfer literatures, but instead circular, which can refer to an object that flows

forwards and backwards, makes stops and gets blocked, etc. (Porto de Oliveira and Pimenta de Faria, 2017). Furthermore, the idea of circulation implies not only the circulation of policies, but also of the agents carrying ideas from one place to another.

French scholars drew attention to the semantic and ideational nature of public policies, as well as to the role of elites, the international standardization of models, and the instrumentalization of policies. They relied on work by French philosophers, sociologists, historians and other disciplines to analyze this phenomenon (Hadjiisky et al., forthcoming; Dumoulin and Saurugger, 2010). Three notions deserve attention here. One is the idea of *translation* (see Chapter 4 by Hassenteufel and Zeigermann in this volume),⁸ from Bruno Latour, which implies that policies are not copied from one place to another, but go through a process of appropriation and modification by those agents carrying out the policy. Such metamorphosis is not only related to the material content of the policy, but also to the abstract dimension, the ideas, discourse, political project, and semantics associated with it. The second is the sociology of elites, drawing from the Bourdieusian perspective, also an important characteristic of these studies, which pays attention to the circulation of individuals between domestic and international institutions carrying out and translating policies according to the arenas where they play out (see Dezalay and Garth, 2002). The legacy of Michel Foucault, combined with Max Weber, in the notion of policy instruments and instrumentalization, developed by Patrick Le Galès and Pierre Lascombes, is used in different studies to specify the objects circulating and their role in public policymaking (Halpern and Galès, 2011). Third, the specificity to these studies is the fact that they draw on extensive empirical fieldwork, where the ethnographic method is frequently used to bring to the discussion the details and micro-dynamics of circulation.

In parallel to public policy analysis research on this topic, work was emerging in the area of urban studies and urban geography, which criticized both transfer and diffusion approaches and developed the notion of **policy mobilities** (McCann, 2008; McCann and Ward, 2011; Peck, 2011). Scholars associated with this stream of research – or rolling conversation as Jamie Peck puts it (Peck, 2011, p. 774) – highlighted that the focus of policy transfer literature was on national policies, the definition of agents and formal (domestic and international) institutions (Peck, 2011), and pointed out a gap in the literature (at that time), related to cities and the global movement of urban models.⁹ Urging the necessity of understanding the dynamics of urban policy movements, authors insisted on the need to engage with global–urban connections, as well as to consider transfers as a “global-relational, social and spatial process that interconnects and constitutes cities” (McCann and Ward, 2011, p. xxii; for a detailed account on urban policy transfer see Chapter 14 by Camila Saraiva, Guillermo Jajamovich and Gabriel Silvestre, and Chapter 8 by Richard Stren in this volume).

Policy mobilities literature was looking into the same phenomena of models traveling at the international level, but with the specific concern of their empirical objects and analytical lenses. Interested in understanding how some cities became global models – such as Porto Alegre, Barcelona, or Austin – and the process through which these are adopted and adapted elsewhere, the policy mobilities approach brings to the discussion the necessity of understanding how policies created within specific historical-geographical circumstances, move through different transnational scales and are anchored at the local level in a territory elsewhere (McCann and Ward, 2011, pp. xiv–xv; for an extensive account of these issues see also Chapter 6 by Jennifer Robinson in this volume). Relying on the work of Deleuze and Guattari, authors bring to the discussion the idea of “assemblages”, which refers to the new

arrangements of parts of a policy model, according to an identity and territory which is in harmony with the discussion about policy translation.

In spite of different approaches, these streams share the underlying goal of understanding and explaining the same phenomenon, that is, the **displacement (in time and space) of “political objects”** (Porto de Oliveira and Pimenta de Faria, 2017). As argued previously, these traditions are not mutually exclusive, but rather overlapping and complementary.¹⁰ They can be combined to improve knowledge production and open the door to a more pluralistic discussion. This was the experience of the International Conference on Policy Diffusion and Development Cooperation, held in São Paulo, Brazil, in 2018, where scholars from different streams of research shared their thoughts in a productive manner. Besides that, combinations of these different literatures have also been used in recent studies by researchers. The work of Cecilia Osorio Gonnet (2018) offers a good example of a combination of both quantitative and qualitative analysis to explain the diffusion of conditional cash transfers in Latin America, with particular attention to Chile and Ecuador. In a similar vein, Carolina Milhorange (2018) uses the French approach to public policy analysis, and the insights of norm diffusion from international relations and network analysis, to understand the internationalization of Brazilian domestic coalitions defending food security and nutrition at the global level. Another example is the work of Diego Ardila – who develops a framework to analyze the role of think tanks in the promotion of Bus Rapid Transit (BRT) from Bogotá – situating his research “in conversation of policy transfers, diffusions and mobilities approaches” (Ardila, 2020, p. 73).

Figure 1.1 *Policy transfer, diffusion and circulation movements*

From a heuristic perspective, the combined use of the terms transfer, diffusion, and circulation can be of analytical value (Porto de Oliveira and Pimenta de Faria, 2017). For example, it is possible to distinguish the range of movement while policies are traveling. Understanding

these words in terms of the scale of the movement, can be helpful for analytical purposes, as Figure 1.1 shows: (1) policy transfer, as a swift movement of adoption; (2) diffusion, as an *ensemble* of adoption; (3) circulation, a fluid movement with multiple pauses and round-way trips. Policies can move from different places (e.g., city, province, country, international, private and public organizations, etc.) to others. This distinction can help scholars to frame the object under analysis, organize the case or comparative study, and set the temporality of the research.

To illustrate such movements, we can think of the policy transfer of social policies from the United States to Britain (Dolowitz et al., 2000). Meanwhile, a diffusion would occur for example when pension reforms developed in Chile are subsequently adopted in Argentina, Mexico, Bolivia, and El Salvador, as in the movement described by Sarah Brooks (2004) and Kurt Weyland (2006, p. 95). For policy circulation we can consider the movement of participatory budgeting, which was first developed in Porto Alegre (1989), then adopted in various cities across the globe (e.g., Saint-Denis (France), Villa El Salvador (Peru), Maputo (Mozambique)), getting onto the agenda of international organizations, then coming back to Porto Alegre – when the World Bank mediated a reform of the program in the mid-2000s – and moving on again to other cities from multiple origins (e.g., Cheng-Du, in China, and New York, in the United States) (Cabannes and Ming, 2014; see also Porto de Oliveira, 2017). These distinctions respect the fact that policies are transformed during the process and that there are distinct instruments traveling, whatever the forces behind their motion, and they can assist the researcher to frame the empirical focus and organize the analysis of policy transfer. This Handbook brings together a series of chapters and authors who navigate in the different streams of research (policy transfer, diffusion, circulation and mobilities). In the next sections, a synthetic presentation of the general dynamics of policy diffusion will be outlined, as well as the cutting-edge and future research trends of the area.

2. DYNAMICS OF POLICY TRANSFER

Authors from different perspectives have outlined policy transfer dynamics. Among the main elements researchers observe in policy transfer dynamics are the objects, levels, agents, arenas, destinations, directions, and forces that are part of, or influence, the movement of policies across boundaries. In this section we will present some of these elements and explore in the next section the most recent frontiers of research in policy transfer.

Objects, Levels, and Destinations of Transfer

One of the first questions that the analyst of policy transfer must ask is “what is being transferred?” The literature informs us that there are different objects that can be transferred. Some of these are abstract, such as ideas, ideologies, principles, discourses, paradigms and so on, while others are more concrete, such as policy models and designs, laws and constitutions, administrative arrangements, forms of government, policy instruments, institutions, etc. To mention just a few examples, scholars have dedicated their research to understand transfer, diffusion, and circulation of the following objects: democratic institutions and participatory democracy (Huntington, 1993; Porto de Oliveira, 2017; Simmons et al., 2010), regulatory agencies (Levi-Faur and Jordana, 2005), pensions (Brooks, 2005), migration policies (Braz,

2018; Channac, 2006; Infantino, 2019), social policies (Kuhlmann et al., 2020; Weyland, 2006), conditional cash transfers (Howlett et al., 2018; Leisering, 2019; Morais de Sá e Silva, 2017; Osorio Gonnet, 2019), transport policies (Ardila, 2020; Mejía-Dugand et al., 2013; Montero, 2017; Wood, 2015b), disaster reduction (Soremi, 2019), rule of law (Dezalay and Garth, 2002), evidence-based health agencies (Hassenteufel et al., 2017), microfinance (Oikawa Cordeiro, 2019), harm reduction (Baker et al., 2020), and administrative capacities (Hadjiisky, 2017), amongst other “objects”. An important feature of policy transfer dynamics is that, as will be discussed later, public policies are not transplanted, and don’t necessarily displace, as a monolithic block, but instead different policy instruments and components, coming from different origins, are combined and translated to meet the demands in the context and expectations of transfer agents.

Where do policy objects come from and where do they go? This question is related to the origin and destination of transfer. Policies are not necessarily transferred from/to governments, they might also move from/to an organization (domestic, international, non-governmental, private, etc.) as well, or even move with individuals while they circulate from one place (e.g., city, country, or institution) to another. As mentioned previously, policy transfers are often a combination of different instruments with distinct origins, and in this sense can be multi-directional. Moreover, transfers go through different state levels or scales, which can be subnational, national, regional, or global. For example, transfers can occur between subnational governments and be related to urban policies (see Chapter 8 by Richard Stren, Chapter 6 by Jennifer Robinson, and Chapter 14 by Camila Saraiva, Guillermo Jajamovich and Gabriel Silvestre in this volume), but they can also scale up from the local to the national level and beyond. When policies are circulating within a specific continent, regional integration process (e.g., European Union, ASEAN, Mercosur, etc.) or group of states, we are dealing with regional or interregional transfer processes (see Chapter 17 by Ramona Coman and Elsa Tulmets in this volume for Europeanization). Groups of countries from different regions often practice policy transfers due to, among other factors, historical legacy (colonialism) or/and cultural, economy, and geopolitical similarities, among others. As an example of official languages, we can mention transfers between the Portuguese-speaking community or between the Francophone Africa, while for economic issues, we can illustrate with the BRICS (Brazil, Russia, India, China, and South Africa) or the G7 (Germany, Canada, United States, France, Italy, Japan, and United Kingdom) countries. To understand how policy objects move in different directions and scales we often need to identify the agents carrying them. This is the topic discussed next.

Agents and Arenas

A plethora of agents can be involved in different moments of policy transfer. Various authors have collaborated to produce an inventory of the different agents operating in policy transfer (Dolowitz and Marsh, 2000; Porto de Oliveira and Pal, 2018; Stone, 2004). These agents have specific power, interests, and tactics of influence, among other characteristics and perform a fundamental role in policy transfers. They can be individuals (Dezalay and Garth, 2002; Gautier et al., 2019; Porto de Oliveira, 2020b), non-governmental organizations, think tanks (Laidi, 2005; Stone, 2001), social movements (see Chapter 11 by Laura Trajber Waisbich, Melissa Pomeroy and Iara Costa Leite in this volume), private agents (see Chapter 9 by Diane Stone, Leslie A. Pal and Osmany Porto de Oliveira in this volume), national and subnational

governments (McCann and Ward, 2011), and international organizations (Dolowitz et al., 2020a; Pal, 2012; Stone and Wright, 2006, see also Chapter 7 by Magdaléna Hadjiisky and Chapter 8 by Richard Stren in this volume), among others.

Transfer doesn't necessarily occur in the place where the policy is adopted. In fact, there are different sites for policy transfers, which can take place both at a domestic and a transnational level, and at different stages. The rise of an international public sphere, with the rise of "global agoras" (Stone, 2008), that is, venues of policy action that are not tied to sovereign jurisdictions, brought to light a vast number of arenas, where sectorial policies can be discussed by international agents (e.g., social policy, health policy, urban policy, food security, etc.), as well as where wider global issues such as sustainability, social movements, or the world economy are considered; for example the Rio, Porto Alegre or Davos Summits (Porto de Oliveira and Pal, 2018).

In these spaces – and the archipelago of meetings that characterize them – agents seek to promote, legitimize, advertise, and advocate their ideas and policy models. They are also the places where funding for projects is negotiated, cooperation agreements are prepared, and best practices are rewarded. Moreover they are sites of negotiation where often agents reach consensus around global public policies (e.g., the 2030 Agenda and the New Urban Agenda). These are important transnational showcases where transfer agents meet and act (Aykut et al., 2017). David Dumoulin Kervran's Chapter 5 in this volume provides a deep sociological account of the dynamics related to policy transfer and global governance with specific attention to environmental politics, presenting also a methodological strategy to analyze such arenas.

Different forces can intervene in transfer, facilitating, restricting, or transforming the whole processes of policy adoption. These are the issues discussed in the next section.

Mechanisms, Resistance and Translation

Dolowitz and Marsh (2000, p. 13) argued that policy transfers can lie along a continuum between voluntary and coercive adoption of a policy. In this sense, policy transfer varies in different degrees of spontaneous desire or external induction. There are distinct types of forces that can influence policy transfers, both fostering the movement of adoption, but also constraining it. The main mechanisms identified in the literature are (1) coercion, when there is an external imposition for adopting a policy, (2) social construction, which is related to the socialization and legitimization of a policy, (3) learning, when governments draw lessons from others, and (4) competition, which refers to situations in which competing governments adopt policies to benefit themselves (Graham et al., 2013; Simmons et al., 2010). However, there are also other forces playing a role in the transfer processes, such as international induction from international organizations, the circulation of individuals, or capacity-building (Porto de Oliveira, 2017). A detailed account on mechanisms is presented by Johanna Kuhlmann in this volume (Chapter 3).

Far from being a consensual process of adoption, governments and civil society from time to time resist foreign models and aid in different forms, sometimes adapting instruments of public action to local interests, or even rejecting them outright. When policies are blocked from traveling, we are dealing with what Leslie Pal (2020) introduced to the policy transfer debate as "resistance". An excellent example of such a process was Brexit, when the United Kingdom "resisted" (and is still rejecting) a wide set of transfers of policy instruments from

the European Union. Other examples can be found in civil society demonstrations in different Latin American countries during the 1990s and early 2000s against neoliberal policy, such as state reforms, opening up the free market and privatizations (Bandeira, 2002).

Last but not least, as mentioned previously, policies are frequently adapted and transformed during the transfer process. Such metamorphosis is related to both the abstract dimension and the concrete dimension of policies transferred. Sometimes even if the institutional design of a policy remains partly preserved, there can be a significant change in the political project being carried out by transfer agents (see the example of participatory budgeting in Chapter 18 by Gilles Pradeau in this volume). The variations of policies when they are adopted were already sketched in Richard Rose's work (1991), who distinguished five ideal types of adaptations: copy, emulation, synthesis, hybridization, and inspiration. As mentioned in the previous section, this process of policies being modified while traveling has been termed "translation" (Hassenteufel et al., 2017; Hassenteufel and de Maillard, 2013; Porto de Oliveira and Pal, 2018; Stone, 2012, 2017) and assemblages (Clarke et al., 2015; McCann and Ward, 2011). Translations do not necessarily take place in the realm of policy design, but they can be related to its semantic nature, the discourse and the political ideas underlying the instrument traveling in time and space. Often, translations are related to the process of resistance, when adopters or other types of transfer agents, reject parts of policy models. In this sense policy translation could be the result of political conflicts and/or negotiations during the transfer process. In the next section we will discuss the different directions in which policies can circulate.

Directions

For a long time, policy transfer discussions were *grosso modo* conducted by scholars based in the Global North. Frameworks, issues, and concepts were developed analyzing empirical objects such as policies moving between Northern countries, such as the United States and Britain (Dolowitz et al., 2000; Hulme, 2006), among European Union states (Bulmer et al., 2007; Hadjiisky, 2017; Halpern, 2014; Padgett, 2003; Peters, 1997; Radaelli, 2000; Saurugger and Surel, 2006), and so on, or from these countries or international organizations to the Global South (Badie, 1992; Bissessar, 2002). However, in the past years other scholars – in particular from Latin America – started to join the discussion bringing fresh insights (Ardila, 2020; Braz, 2018; Dussauge-Laguna, 2013; Milhorange, 2018; Morais de Sá e Silva, 2017; Osorio Gonnet, 2019; Pacheco-Vega, 2015; Porto de Oliveira, 2017). This was due to a new empirical configuration in global public policymaking, where different policy innovations produced in the South, both local and national, started to gain international recognition and circulation worldwide.

Two global movements contributed significantly to this development. After the economic crisis of 2008, development cooperation came through a change of pattern, when rising powers at the time such as the BRICS countries, especially China and Brazil, were called on to be more proactive. Besides that, international organizations and development cooperation agencies came to an understanding that policy models produced in the South might be more effective in developing countries than those produced in the North, due to geographical, institutional, contextual demographic, and economic similarities. Examples of such policies with an extensive portfolio of international transfers are participatory budgeting (Baiocchi and Ganuza, 2016; Porto de Oliveira, 2017; Sintomer et al., 2012; see also Chapter 18 by Gilles Pradeau in this volume), conditional cash transfers (Leisering, 2019; Morais de Sá e Silva, 2017; see

also Chapter 15 by Cecilia Osorio Gonnet in this volume), microfinance (Oikawa Cordeiro, 2019), and Bus Rapid Transit (Ardila, 2020; Mejía-Dugand et al., 2013; Wood, 2015a; see also Chapter 14 by Saraiva, Jajamovich and Silvestre in this volume), among others.

The circulation of these policies, both South–South and South–North, brought to the attention of researchers that the dynamics of transfers were not necessarily similar to those in North–North and North–South transfers and circulation. Analysis started to call attention *inter alia* to the importance of the relation of policy transfer with development cooperation, mutual learning, governmental solidarity, policy legitimation, the circulation of Southern elites, power relations with international organizations, and foreign policy. This expansion of “circuits of policy transfers” (Porto de Oliveira and Osorio, 2019), beyond OECD countries led researchers to explore other latitudes, such as Latin America (Brooks, 2004; Porto de Oliveira et al., 2020a; Weyland, 2006; see also Chapter 15 by Cecilia Osorio Gonnet in this volume), the Middle East (Tok et al., 2016), Asia (Betz and Neff, 2017; Romano, 2020; see also Chapter 16 by Kidjie Saguin and Kritika Sha in this volume), Africa (Soremi, 2019; Wood, 2015b), and the polar circles, with the Arctic (Spence, 2019) and Antarctic countries. These new circuits of policy transfers were not only spaces where knowledge about policy was needed to boost state institutions or adjust these to meet international policy standards, but also where learning, exchange, and cooperation were fundamental tools to achieve these goals. In the next section we will discuss six new frontiers of research.

3. FRONTIERS OF KNOWLEDGE

In spite of this accumulation of knowledge produced over the past few years, new questions arose but also old puzzles still remain unsolved. There are still past and present empirical settings, theoretical questions, and methodological issues that require deeper study in order to help us to explain these phenomena with greater precision. In this section, we will consider some of the frontiers of knowledge in the field.¹¹

Time

The multiple dimensions of time have been a significant concern for public policy analysts (Pierson, 2000). The issue of time was already flagged by Richard Rose, who noted that “everyone concerned with public policy unconsciously draws lessons across time and space” (Rose, 1991, p. 6). Policy diffusion scholarship interested in innovations observes to the “S” shaped curve (Rogers, 2003), pointing out different movements with a hesitant beginning that move to rapid escalation and finally a leveling off (Simmons et al., 2010, p. 3), where types of adopters, according to the moment of policy implementation, take part in the process, that is, pioneers, early and late adopters and laggards (Francesco, 2013, p. 11).

This is related to the fact that policy transfer can be an adoption or inspiration of a policy from some experience in the present or from the past. From another perspective, the work of Jamie Peck and Nik Theodore (2015) in *Fast Policy: Experimental Statecraft at the Thresholds of Neoliberalism*, brought to the discussion the speed with which policies travel. As the authors argue, in contemporary society policymaking processes take place more rapidly than before; in their words the idea of “Fast policy refers to a condition of deepening transnational interconnectedness, in which local policy experiments exist in relation to near and far

relatives, to traveling models and technocratic designs, and to a host of financial, technical, social, and symbolic networks that invariably loop through centers of power and persuasion” (Peck and Theodore, 2015). Whether there is in fact a global trend of fast policy, however, was criticized by Astrid Wood (2015a). While analyzing the adoption of BRT in South Africa, she found that the policy circulation process, instead of being accelerated, can be a gradual process, involving repetitive attempts, failures, and delays. If policy ideas, solutions, and models appear to move faster than in previous decades, their implementation on the ground might face resistance, institutional gridlocks, bureaucratic barriers, budgeting constraints, lack of institutional and political infrastructure and so on, that all delay the process and extend the time before adoption.

To understand the role of time in policy transfer, Dolowitz, Plugaru, and Saurugger (2020b) proposed three different categories, namely, time, timing and *tempo*. *Timing* is a relationship between time and opportunity. *Tempo* is the rhythm of policy transfer. *Time* is simply the chronological span of transfer. The authors also distinguish between domestic (which might be marked by electoral cycles) and international time (which might be related to international bureaucratic meetings) (Dolowitz et al., 2020b, p. 451). In a different vein, Michelle Morais de Sá e Silva and Osmany Porto de Oliveira (Silva and Porto de Oliveira, 2021) present a new perspective, which considers the life of policies and their changes in the multiple paths of transfers across the globe. The concern here is with policies that have a long track of transfers in time, such as conditional cash transfers and participatory budgeting, both of which have circulated worldwide for more than two decades. Analyzing the longevity of a policy transfer, it is possible to trace its metamorphosis (both on the ideational dimension and the institutional design), as well as the nature of adopters and the behavior of a policy while being transferred in time (international legitimation/delegitimation), waves of adoption and abandon, etc. In spite of such advances and the rise of a concern with the relationship between time and history (we can also include memory and policy transfer), there is still a lack of conceptualization as well as meticulous empirical investigation on such dimensions.

Culture

The relationship between policy transfer and culture was part of discussions in French studies of the 1990s under the lead of Jean-François Bayart, but was largely neglected. Today, the role culture plays in policy transfer is still under-explored by researchers. In spite of this vacuum of research, this is a crucial dimension to understand contemporary policy transfers, especially when policy instruments move to societies with strong political cultures and traditional roots in politics. Take as an example the influence of the ideal of the Kitchuwa concept of Sumak Kawsay (*buen vivir* or living well), installed in the Ecuador Constitution during Correa’s government (Pimenta de Faria, 2016), or the idea of the Ubuntu principles in South Africa and social warfare (Butterfield and Abye, 2013, p. 26; Muxe Nkondo, 2007), or the perception of family in Qatar (Tok et al., 2016), or Confucianism in China, among other examples. Besides that, political and administrative culture also plays a significant role in policy transfer, in particular, the capacity of governments to implement foreign models (designed in different political systems and under different historical, social, political, and institutional configurations) in their countries. Olivier de Sardan et al. (2017) point this out for healthcare in sub-Saharan Africa.

Thus, the impact of culture in policy transfer is at least twofold. On the one hand, policies from abroad and “global prescriptions” advocated by international organizations, might have to adapt and include national or local cultural elements. In this way models are shaped according to culture through a translation process, which produces new configurations of policy instruments. On the other hand, domestic actors might neglect aspects of domestic culture to meet the interests and appearance of internationally “accepted” best practices, in order to project an image of “global” or “Western” administrative culture. Yet the dimension of culture is still overlooked by policy transfers. Chapter 13 by Giulia C. Romano in this volume offers an overview of the question of culture, in an attempt to bring fresh insights to the discussion.

Foreign Policy and Development Cooperation

The use of policy transfer as a *soft power* strategy by states is not new. Recently Brazil, for example, progressively became more interested in promoting its policies abroad. Indeed, social policies were part of the Brazilian foreign affairs strategy (Pimenta de Faria, 2012). Policies relating to, for example, conditional cash transfer programs, food purchase and health, were transferred from Brazil to Latin American and African partners (Cabral et al., 2013; Leite and Peres, 2014; Porto de Oliveira et al., 2020). China has invested heavily in development cooperation in Africa in different areas, promoting a narrative which insisted on a “mutual benefit” model. However, solidarity claims of South–South cooperation may in fact mask new forms of imperialism (Alden et al., 2008). There are several different facets of foreign policy which are related to policy transfer.

In the realm of foreign aid, development cooperation does not always come as income transfers to governments for improving the quality of life of the population, or to solve a situation of crisis and emergency (for a detailed account about foreign aid see Lancaster, 2007). In fact, technical assistance represents an important part of this area of foreign policy. Development cooperation can serve as a policy transfer instrument, that is, a formalized agreement that will define the schedule, budget, agents, goals, agents, conditions, etc. involved in the adoption. In fact, international organizations and governmental agencies often channel their aid through mechanisms of policy transfer. The World Bank, for example, is among the major agents involved in such activities of scanning best practices and policy innovations abroad, which often serve as “global prescriptions” to solve public problems in developing countries. But bilateral aid agencies are involved in such processes as well, such as the German GIZ (*Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH*), the United Kingdom Department for International Development (DFID), or even in the Andalucía network of sub-national governments and other agencies, which coordinate interests and technical resources and funds for human development in local governments, called *Fondo Andaluz de Municipios para la Solidaridad Internacional* (FAMSI). In the case of Brazil, for example, policy transfer of successful Brazilian social technologies is the very DNA of its development cooperation. In spite of the extensive body of studies produced in the field of development cooperation (Mawdsley et al., 2017; Pomeroy et al., 2020; Quadir, 2013), it was only recently that this discussion started to be juxtaposed with policy transfer analysis issues and concepts (Constantine and Shankland, 2017; Stone et al., 2020; Porto de Oliveira and Milani, forthcoming).

The realm of international development, the professionals that perform on such stages and the institutions engaged in activities of this nature – the so-called “Aidland” (Mosse, 2011) – is an important and overlooked setting that, if observed more carefully, can improve our under-

standing of policy transfer phenomena. First, the dynamics of such a realm are an insightful venue for understanding transfer agents, interests and policy translations. Second, there are specific dynamics for the different levels of cooperation, that is, decentralized (subnational government) or centralized (national government), as well as a common background in which they operate. Third, if development cooperation takes place on formal grounds, with an agreement, defining the goals, means, budget, schedule and so on, there are also less informal and parallel settings through which policies flow internationally, such as networks of experts and transnational platforms. Moreover, understanding the dynamics of policy transfers via development cooperation enables us to access the different power relations that are imbedded in such projects, as well as the way in which identities, ideas, and narratives are being (re) produced. In recent years another phenomenon has emerged in politics all over the world with far-right leaders being elected in different countries. This frontier of knowledge will be discussed in the next section.

Far-Right, Neo-Populism, and Post-Truth

A new element to consider in policy transfer, which will require a daunting endeavor for the next generations of researchers, is to understand the consequences for international policy transfers with the rise of new, far-right politicians in leadership positions, such as Donald Trump in the United States, Viktor Orbán in Hungary, Matteo Salvini in Italy or Jair Bolsonaro in Brazil. Far-right, neo-populist, and post-truth impacts on policy transfers are still *terra incognita e obscura* and serve to unbalance the political game and strategies in world politics, and they deserve careful attention. Far-right leaders have been defending anti-globalist positions, as well as criticizing international organizations or withdrawing from international agreements such as the UN Human Rights Council or the Paris Agreement on Climate Change. This is in a totally opposite line from what the first generations of analysts of policy transfers – “born” with the fall of the Berlin Wall – would have imagined for the rest of humanity, that is, an inexorable movement of intensification of the process of globalization. Moreover, these leaders use strategies of neo-populism – often through social media such as Twitter – and often rely on or create fake news to reinforce their public policy convictions. Again, this is in complete opposition to one of the “conventional” ways of legitimating policy transfers, that is, through the work of experts and epistemic communities, especially those in international organizations (Pal, 2012). The pandemic context, as will be discussed later, reveals some of the operational nature of nationalist neo-populist leaders.

What we have been witnessing with these far-right neo-populist strategies is the coexistence of anti-globalization claims and post-truth politics with policy transfer. If anti-globalism pressures at first glance might undermine the life of international policy transfers, from another perspective what we might be witnessing is the creation of new “short-circuits” of policy transfers between far-right leaders (Porto de Oliveira and Osorio, 2019). In this scenario, we don’t have the global policy circuits of policies traveling fast among heterogeneous countries, but solutions for public problems circulating inside newly formed “archipelagos” of governments (with some islands bigger than others, e.g., the United States), where leaders share a similar political project. At the same time far-right leaders are resisting global prescriptions, goals and standards (such as Bolsonaro for example rejecting the WHO recommendations to fight against COVID-19) and transferring policies and strategies within a smaller group. There are “new rationalities” and understandings of public policymaking – that might be based on

emotions and interests, among other factors – which are fostering such policy transfers. These are only some of the questions that arise with this new empirical setting that has emerged in the past years. In the next section, the power relations and markets of policy transfers will be discussed as an avenue for research.

The Markets and Geopolitics of Policy Transfer

The global stage of public policies is occupied by different agents promoting specific policy solutions and competing between them, where different relations of power and politics interplay. The OECD countries and the organization itself, as well as the World Bank and other international organizations, have dominated the diffusion of policy models. According to Leslie Pal (2012), as the OECD evolved, its mission became that of producing and diffusing policy knowledge to different countries. As Ngaire Woods (2006) argues, the World Bank had an important role in promoting and globalizing policy models. Not only governments and organizations advocate for specific policies, but also individuals are involved in such activities: for example Bogotá's Mayor Enrique Peñalosa and the transnational think tanks associated with the Bus Rapid Transit policy (Ardila, 2020), or Santiago Levy¹² with the advocacy of conditional cash transfers (Osorio Gonnet, 2018), or Muhammad Yunus with micro-credit (Oikawa Cordeiro, 2019). Often, there are different alternatives to solve the problems of society, as shown in the case of pension reforms models in the 1990s, where for example Chile (and the "Chicago Boys") was offering one solution (Brooks, 2004) and the World Bank another (Ramesh, 2006).

These agents sometimes cooperate and sometimes compete. They compete for funding, regional spheres of influence (e.g., developing countries, commonwealth countries, Francophone or Lusophone Africa, post-communist states, etc.), awards (as best practices), and political power in international organizations, among other things. The global public policymaking domain is their stage of action and where they legitimate and promote their models. This configuration has created a sort of "global market of policy transfers". In this realm, power relations are also present and might correspond to geopolitical dynamics. Understanding the micro-dynamics and the operatory nature of these markets – and their players – is a challenge for the next generation of researchers. In the following section the combination of policy transfers and global governance will be discussed.

Policy Transfer, Modern Diplomacy, and Global Governance

International policy coordination is strictly intertwined with transfers. As states cooperate to solve mutual problems or to address global issues, they also define the goals and means to achieve them, frequently recommending specific policy solutions and global prescriptions. International organizations are often steering this process of "global governance", producing general and specific agendas to guide states and other agents in their actions. Global governance is associated with the capacity to address problems of "global concern" (Kakowitz) and often what is behind the production of global public policies (Moloney and Stone, 2019). As an example of a generic agenda we can mention the 2030 Agenda that addressed the Sustainable Development Goals (SDG), while on a more specific level we can think of the UN-Habitat New Urban Agenda (NUA). These agendas are designed to direct the efforts of all governments towards a set of principles and goals established by international organizations

for a certain period of time, which might be around a decade or more. As a cascade effect, every sub-level, from the regional and national to local will concentrate efforts to meet such goals. Funding for projects starts to require the incorporation of these goals or to be targeted on specific ones, such as fighting poverty (SDG 1), achieving gender equality (SDG 5), ensuring the right to the city (NUA), and so on.

The sectorial dimension of global governance is a relevant feature, which brings to the discussion its relation to modern diplomacy. The idea of modern diplomacy is related to a change in traditional diplomacy in recent years. Traditional diplomacy is characterized by the monopoly of foreign affairs by diplomats and state leaders. However, such “de jure” monopoly of foreign affairs was eroded by the growth of a wide range of “de facto” agents operating in international relations, from celebrities and philanthropic institutions to NGOs, etc. (Cooper et al., 2013). Among the novelties of such dynamics is the progressive international engagement of sectorial institutions and their community of agents in different types of diplomacy, such as science diplomacy, food nutrition diplomacy, sports diplomacy, human rights diplomacy, and para-diplomacy (Aldecoa and Keating, 1999), among others. As examples we can observe different international departments allocated in ministerial divisions, engaging in technical cooperation with other countries, which are designed to transfer sectorial policies (education, social security, farming, etc.) from one state to another. Cities diplomacy is also an important feature of these dynamics, where for example the Metropolis Network created a platform designed for policy transfers in urban sustainable policies.¹³

As an example of such agreements, the recent global outbreak of Coronavirus (COVID-19) and the urgent necessity of states to respond to an unpredicted and hitherto unknown situation in the sector of public health, led to an unprecedented empirical setting to understanding policy transfers, in the context of global governance and modern diplomacy. The World Health Organization assumed a protagonist role by inducing and coordinating policy responses worldwide, not only by declaring the outbreak a health emergency of international concern and later characterizing the COVID-19 situation as a pandemic, but also by preparing recommendations for governments and a database on the evolution of cases around the world on a daily basis.¹⁴ A constellation of specialized organizations within the United Nations system and in other domains also directed actions to fight against COVID-19. The World Bank released significant funding to tackle the crisis in developing countries;¹⁵ the International Monetary Fund provided financial assistance and debt release to deal with the economic impact of the pandemic;¹⁶ and UNESCO, concerned with the situation of 1.2 billion students at home due to the suspension of classes, launched a coalition for global education.¹⁷ Meanwhile, with regard to local governments, for example, an initiative led by the Metropolis Network with the support of the United Cities and Local Governments (UCLG), created an international platform to share responses to the crisis called Cities for Global Health.¹⁸ Even the G20 announced a package of 5 trillion dollars to address this issue. The private sector has also been engaged in COVID-19 policy related responses, for example the Bill and Melinda Gates Foundation.¹⁹ Epistemic communities of epidemiologists appeared all over the world giving advice on the best strategies to “flatten the curve”. Paradoxically, along with this intense effort in producing global public policies to fight against the pandemic crisis, strong expressions of nationalism took place, perhaps the most flagrant being the closing of borders and defunding the World Health Organization, while more discreet (and polemic) sanitary protectionist measures were practiced by governments fighting over medical supplies (e.g., the “war on breathing masks” between France and Sweden).²⁰

Understanding global governance through the perspective of policy transfer is still an overlooked issue. The challenge is twofold, both macro and micro. From the macro perspective, it is important to explain, for example, how global goals and agendas are reached at a global level and look into the micro-dynamics inside the arenas, where agents of modern diplomacy interact (see Chapter 5 by David Dumoulin Kervran in this volume). In this sense, it is also important to direct analysis to the processes and power relations of the deliberative processes in the so-called global agoras. Finally, these agendas affect, as mentioned previously, all levels of government and it is time to address the question of how these are absorbed at each level until localization occurs in subnational communities. There are different forces interplaying in the anchoring of such goals at the local level, which are related to the dynamics of policy transfer mentioned previously such as state capacities, resistance, and translation, to mention a few. The example of COVID-19 is just one recent and devastating event in recent times that brings all these issues together, but there are plenty of other cases spanning across different sectors of public policy.

4. ORGANIZATION OF THE BOOK AND CONCLUDING REMARKS

The Handbook is organized in four parts. Classic and cutting-edge debates are presented in the first part, with the discussion of concepts and methods. David P. Dolowitz develops a link between learning and transfer, discussing also the literature of knowledge updating. In the following chapter, Johanna Kuhlmann provides a discussion about causal mechanisms that go beyond learning, coercion, emulation, and competition. Combining the dimensions of discourse, actors, and institutions, Patrick Hassenteufel and Ulrike Zeigermann discuss the notion of translation in policy transfer in Chapter 4. Based on the experience of a collaborative ethnography of global environmental summits, David Dumoulin Kervran outlines a strategy for understanding policy transfer arenas. The first part is concluded with a chapter by Jennifer Robinson about comparison, from the policy mobility perspective, which focuses on urban policies.

The second part concerns the debate on agent, structure, and policy instruments. This includes classic discussions about international organizations, in the chapters by Magdaléna Hadjiisky, who provides a more theoretical presentation of issues and practices related to this area, and Richard Stren, who analyzes the role of the World Bank and United Nations in the transfer of urban policies. Ground-breaking topics are at the heart of the chapters that compose this part, such as the role of private actors as advisory organizations, presented by Diane Stone and colleagues, and instrument constituencies as transfer agents, which is developed by Michael Howlett and Kidjie Saguin. The operation of non-governmental organizations in policy transfers across developing countries is discussed by Laura Trajber Waisbich and colleagues, and the engagement of knowledge transnational networks, such as T20, on reframing the global order is discussed by Leslie A. Pal and Jennifer Spence.

The third part of the Handbook discusses new and fresh issues on policy diffusion research. Giulia C. Romano examines the role of culture in policy transfers. Camila Saraiva and colleagues tackle urban policy innovations in Southern cities, discussing both history and best practices. Policy transfers are then discussed in chapters covering three different regions:

in Latin America, in the chapter by Cecilia Osorio Gonnet; in Asia in the chapter by Kidjie Saguin and Kritika Sha; and in Europe in the chapter by Ramona Coman and Elsa Tulmets.

The fourth part of the Handbook goes deeper into the specificities of a wide range of objects of policy transfer: participatory institutions, in the chapter by Gilles Pradeau; environmental policies, in the chapter by Raul Pacheco-Vega; rural policies in the chapter by Eric Sabourin and Carolina Milhorce; health policies in the chapter by Matthias Brunn; and regulatory instruments in the chapter by Fabrizio De Francesco. These chapters bring together both examples of policies traveling and the specificities of agents and dynamics of each policy sector.

The chapters in this volume combine to provide a comparative and international perspective of the field. The team of scholars contributing to this Handbook include well-established researchers from the Global North, such as David Dolowitz, emerging scholars from the Global South, like Cecilia Osorio Gonnet, those early in their career such as Giulia Romano and PhD candidates such as Kidjie Saguin. In this Handbook the reader will also find cutting-edge discussions that challenge consensus and accumulated knowledge of the area, providing critical and provocative insights for the debate.

This Handbook is aimed at both established scholars and researchers and postgraduate and undergraduate students. The various features presented above are what make this Handbook unique: a volume that brings together preeminent scholars from different regions of the world, sharing their perspectives, with original works, encompassing the most important issues and questions of policy transfer. This Handbook is published in an era of pandemic, when learning from each other is what the world community needs to better understand public policymaking.

NOTES

1. The author is grateful to Diane Stone and Leslie Pal for their valuable comments on a previous version of this text. The study presented in this chapter is part of the results of the author's research project funded by the Brazilian National Council for Scientific and Technological Development (CNPq) – Process 424294/2016-8.
2. In 2016 the Conference was called “International Seminar on Policy Diffusion”.
3. The presentation of each stream reflects a stylized view of the approach, based on the review of the literature published in the past years.
4. The authors list a few structural factors in policy diffusion analysis as “trade partnership, capital city proximity, geographical proximity, trade with the United States, previous economic outcomes” (Marsh and Sharman, 2009, p. 274).
5. The terminology of policy transfer was already present in Richard Rose's texts about lesson-drawing, when he discusses the “desirability and practicality of transferring policies” (Rose, 1991, p. 27).
6. Various works presented the differences between policy diffusion and the policy transfer approach (e.g., Levi-Faur and Vigoda-Gadot, 2006; Marsh and Sharman, 2009).
7. This is one of the most cited articles in the area, with 3615 citations in May 2020, according to Google Scholar: <https://scholar.google.com/citations?user=5w-T9nkAAAAJ&hl=en>, accessed May 19, 2020.
8. Diane Stone in a similar way brought the idea of translation to the discussion as well, including the discussion of policy failure (see Stone, 2012, 2017).
9. It is worth noting that Dolowitz and Marsh replied directly to their critique in an article published in *Political Studies Review* (see Dolowitz and Marsh, 2012).
10. Marsh and Sharman (2009) already argued that policy diffusion and policy transfer approaches were complementary.
11. This section complements a previous publication (see Porto de Oliveira and Pal, 2018).

12. Mexican economist, with a position in the public sector, who worked for the government of Mexico and is known as the architect of the social program Progres-Oportunidades, one of the most popular conditional cash transfer experiences in the world.
13. <https://use.metropolis.org>, accessed May 19, 2020.
14. Database with the map and the evolution of COVID-19 can be found at <https://covid19.who.int>, accessed May 19, 2020.
15. <https://www.worldbank.org/en/news/press-release/2020/04/27/pef-allocates-us195-million-to-more-than-60-low-income-countries-to-fight-covid-19>, accessed May 19, 2020.
16. <https://www.imf.org/en/Topics/imf-and-covid19/COVID-Lending-Tracker>, accessed May 19, 2020.
17. <https://en.unesco.org/covid19/educationresponse/globalcoalition>, accessed May 19, 2020.
18. <https://www.citiesforglobalhealth.org>, accessed May 19, 2020.
19. <https://www.gatesfoundation.org/TheOptimist/coronavirus>, accessed May 19, 2020.
20. https://www.lexpress.fr/actualite/monde/europe/requisition-et-indignation-partagee-la-guerre-des-masques-entre-la-suede-et-la-france_2122374.html, accessed May 19, 2020.

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