

Perspectives on Policy Transfer

The Case of the OECD

NANNA KILDAL

STEIN ROKKAN CENTRE FOR SOCIAL STUDIES

BERGEN UNIVERSITY RESEARCH FOUNDATION

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Innhold

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Preface

This working paper is based on a lecture given at the Inter-University of Dubrovnik, Croatia, in April 2003 on the course *Welfare, Multiculturalism, and European Development*. The course was part of the project «*The Politics of Democratic and Welfare Development in South Eastern Europe: a Network for Research and Education*», which is a co-operation between University of Bergen (Norway), University of Zagreb (Croatia) and Institute for Strengthening Democracy, Konjic (Bosnia). The project is financed by The Research Council of Norway.

Summary

The issue of this working paper is the study of ‘policy transfer’ between international organisations and national welfare reforms, which is illustrated by a study of the OECD. As the OECD’s multilateral surveillance is limited to the exertion of moral pressure and the practice of ‘naming and shaming’, this organisation constitutes an interesting case for study as the power of the ideas advocated by international organisations is more exposed in the absence of financial or legal pressures. Thus, the question is whether the OECD has the ‘ideational authority’ to influence its member countries. The paper presents different roles played by the OECD in what is called the ‘idea game’, and the question whether the OECD is an influential international actor is discussed on the basis of a recent study of the impact of the OECD’s political analyses and recommendations on national social policy, in 14 European countries over a 30-year period. As a conclusion, it is argued that the OECD’s plans for policy changes are not easily introduced into national political agendas. Rather, policy proposals seem to have a chance of being adopted only if they resonate well with national politics, institutions and broadly held values.

Sammendrag

Notatet diskuterer ulike sider ved studiet av 'policy transfer', illustrert ved en analyse av OECD. Etter som OECDs overvåking og kontroll av medlemslandenes utvikling er begrenset til utøvelsen av moralsk press, er denne organisasjonen spesielt interessant ved studiet av internasjonale organisasjoners innflytelse på enkeltland: de politiske idéenes gjennomslagskraft blir særlig godt belyst ved fravær av økonomisk og rettslig press. Spørsmålet er om OECD har den ideologiske autoritet som kreves for å innvirke på medlemsstatenes sosialpolitiske utvikling? Notatet presenterer og diskuterer forskjellige roller som OECD inntar i sitt 'idé spill', og spørsmålet om hvorvidt OECD er en innflytelsesrik internasjonal aktør blir drøftet på basis av en nylig gjennomført studie av den innflytelse OECD utøver gjennom sine sosialpolitiske analyser og anbefalinger til 14 europeiske velferdsstater gjennom en 30-årsperiode. En hovedkonklusjon er at OECDs ideer for politiske reformer ikke lett kan introduseres til nasjonale politiske agendaer. Politiske forslag synes bare å ha en sjanse til å bli akseptert dersom de får en klangbunn i den nasjonale politikken og i bredt aksepterte nasjonale verdisystemer.

Introduction

'Policy transfer' is an area of increasing interest within politics and research in a world characterised by internationalisation and globalisation; by a noticeable contraction of time and space. Obviously we know much more about various national public policies and different welfare systems today than we did some decades ago. Different national welfare models and institutions have been mapped and explored and the opportunities for learning from other jurisdictions have increased through a variety of professional and political meeting points. For governments, this search for policy solutions and practices, this 'policy shopping', has become an important tool in the policy-making process.

Yet, despite the recent revival of interest in the transfer of policy elements, it still represents a fairly diffuse field of study. According to David Dolowitz, one of the main researchers in this area, 'policy transfer' can be defined as «the process by which the policies and/or practices of one political system are fed into and utilised in the policy-making arena of another political system» (2003: 101). However, this transmission of ideas is also conceptualised as 'diffusion' and 'convergence' and even if the concepts concentrate on closely related dimensions of social change and are often used interchangeably, they are not identical. While the concept of 'transfer' focuses on the *process* of transmission, studies of 'convergence' focus on the *outcome* of that process. More specifically, the former operates at the meso level, focusing on the actions of states and public officials, whereas the latter is a macro concept that refers to patterns of similarity between the economic, social and political institutions of various countries. 'Diffusion', on the other hand, is more concerned with the *conditions* of policy transfer; with identifying the patterns according to which policies spread, on any level of research (Bennett 1991).

The travelling of ideas and policies is certainly not new in human history. Influences across cultural borders have always been noticeable. For instance, the first legislative initiatives concerning social insurance in Norway and Sweden were undoubtedly generated by German legislation of the early 1880s (Kuhnle 1996). The description of Iraq as the 'cradle of civilization' also points to the well-established fact that ideas and cultural elements have been spread around the world all through the history of mankind.

The systematic study of these processes is neither new. A theoretical framework was developed in the 19th century which regarded the 'diffusion' of cultural elements from one group of people to another as the driving force of social development. This theory opposed the prevailing 'evolution theory' of the period, according to which societies have an inbuilt potential for development in terms of a universal succession. As functionalism rose to predominance in social science around WWI, diffusionism gradually went out of fashion. Today, however, there is an evident revival of interest in this theory.

International organisations

In the rapidly growing literature concerning the impact of globalisation on welfare states, the focus is first and foremost on economic and technological forces and less on ideational ones. This means that less systematic attention has been paid to the ideational roles played by international actors such as the OECD, the ILO, the World Bank etc. in the design of social policy models and reforms. Among these organisations, the OECD plays a special role: its function is limited to the exertion of *moral pressure* in contrast to the others, which may use regulatory or financial forces to influence the behaviour of national actors. The ILO for instance, formulates conventions that have to be submitted to parliaments, and which become binding for the country in question once adopted. Other international actors may impose considerable fines on member states if common rules are disobeyed. The OECD possesses no such means for getting its goals and advice directly onto national agendas. Its primary tool is the practice of ‘naming and shaming’, which leaves the parliaments and governments free to disregard OECD advice. Hence, the OECD makes use of a kind of ‘soft regulation’, which means that the organisation has no option but to play what is called the ‘idea game’ (Marcussen 2002; 2003). It should be noted that the EU chose a similar mechanism for international policy coordination at its 2000 Lisbon summit, namely ‘the open method of coordination’, a kind of soft procedure that closely resembles the ‘multilateral surveillance’ employed by the OECD.¹

The OECD and the idea game

This paper aims at clarifying some aspects of the debate about external pressure from international organisations on national decision-making processes in the field of welfare policy. The focus will be on the OECD, firstly, because this organisation constitutes an interesting case for study insofar as the power of the ideas advocated by international organisations is more exposed in the absence of financial or legal pressures. Secondly, this was the organisation chosen by a European research group, COST Action 15, to which Stein Kuhnle² and I belong, for a study of the impact of international ideas on national welfare policies.³

The OECD (Organisation for Economic Co-operation and Development) analyses and evaluates a wide range of policy areas that have the potential to improve economic performance. It also offers specific policy recommendations to individual member countries on the basis of empirical analyses of their respective economies. The analyses

¹ This method was defined as a «means of spreading best practice and achieving greater convergence towards the main EU goals». It involves *inter alia* fixing guidelines and timetables for achieving the goals for the member states, and periodic monitoring, evaluation and peer review organised as what they call ‘mutual learning processes’.

² Professor in comparative politics at the university of Bergen.

³ The title of this Action is: «Reforming Social Protection Systems in Europe». The working group’s main objective is to study the dynamics of transformation of social protection systems in Europe in the context of globalisation and European construction.

and proposed solutions are published in annual Economic Surveys. From the mid 60s to the mid 80s, these surveys focused purely on economic issues. During the last twenty years, however, they have gradually turned to social policy, though primarily focusing on economic implications. In this way the OECD seeks to promote its agenda of social policy debate and welfare reform in member countries, and it was these OECD Economic Surveys for 14 European countries over a 30-year period (1970–2000), that the working group (WG1) of the COST Action explored. The questions we raised were: What problems did the OECD identify as important in each country? What were the major criticisms? What were the major policy recommendations? And, not least, what *actual* welfare reforms were implemented in the relevant countries? In short, our project was concerned with two essential issues:

1. *Consistency of OECD recommendations*: do the ideas and suggestions concerning welfare state development vary according to national contexts, or does the OECD promote uniform ideas for all countries?
2. *Effectiveness of the recommendations*: to what extent do national policy developments agree with the OECD policy recommendations?

If high levels of both *consistency* and *effectiveness* can be identified, it can be said that the OECD is a powerful international organisation of policy transfer (Armingeon and Beyeler 2003).

However, before taking a closer look at this study, it will be instructive to clarify how the OECD functions as a medium for the transfer of ideas. Since the OECD performs a kind of multilateral surveillance based solely on moral pressure, it is bound to be an efficient player of the idea game. According to Marcussen, who writes on this in our study, the OECD plays different roles in this game, two of which have been important since the founding of the organisation in 1961 (Marcussen 2003). In its early years it was argued that the main function of the OECD was the regular process of ‘consultation’ between its expert groups and member countries. The overall purpose of this consultation activity was to develop a common value system among civil servants in the OECD countries, a common worldview that should establish a basis for shared definitions of problems and solutions for the framing of economic policy. Thus, the idea game concerns the formulation and transfer of those ideas that are expected to induce certain types of behaviour within the OECD area. The following two roles have been especially important to the OECD in playing in this game. The roles of

- ideational artist, and
- ideational arbitrator (mediator).

An ideational artist

This role involves the formulation, testing and diffusion of new policy ideas. In playing this role, the OECD can be depicted as an enormous think-tank, willing to help its member states with empirically-based advice. This role pictures the OECD as a neutral consultation forum with employees whose loyalty to the OECD is stronger than the

loyalty to their home countries. As a financially and politically independent body, an ‘epistemic community’, the OECD should be able to distance itself from national controversies and dedicate itself completely to empirical concerns.

An ideational arbitrator

The second role of the OECD is to serve as a meeting place for various ideas. In order to be an efficient player in the idea game, the OECD arranges for national civil servants to meet and develop their personal and technical skills through learning processes such as socialization, imitation and coercion. The actual meetings can therefore be characterised as social interaction ranging from tough bargaining to friendly deliberation. The OECD estimates that some 40,000 civil servants from the various member countries pass through the OECD meeting rooms in Paris each year. In keeping with this picture, the OECD has been characterised as a ‘talking shop’ which provides participants with ‘mutual education’ thanks to the many direct confrontations that occur between civil servants of different nationalities in the various OECD forums. Formal agreements are seldom made, but national officials return to their countries bearing ideas that may find their way into national legislation or regulations. Where the latter actually happens, the moral pressure can be said to have been influential; then the OECD has managed to establish what it considers to be a rightful national discourse and politically correct behaviour (Marcussen 2003).

According to Marcussen (2003), some of the normative standards developed in the meeting rooms in Paris are well illustrated in the titles of some of the many publications produced by the OECD secretariat, such as ‘A caring world’ or ‘Trust in Government’, titles that signal the ‘right’ and ‘good’ opinion about a complex set of problems. And although member countries are not formally required to respect the OECD’s criteria for ‘responsible’ economic behaviour, especially the laggards within the OECD may nevertheless feel its recommendations as forceful moral pressure.

Competing organisations: new ideational roles

A problem in any discussion of policy transfer is the current fragmentation and functional separation of organisations, and the conflicts and competition within and between them (Deacon 2000: 33). This competition concerns both the right to participate in shaping global social policy and the content of the policies. A recent study of ideas of fairness advocated by the World Bank and the ILO shows for instance that, in relation to pension systems, ideas of justice are conspicuously diverse (Ervik 2003). Whereas the World Bank strongly advocates the principle of actuarial fairness, which implies a symmetry between individual contributions and pension benefits, the ILO argues that pension schemes should provide universal coverage on the basis of fundamental social rights. Whereas the ILO is concerned with poverty alleviation, the World Bank argues that redistributive efforts should be restricted to averting poverty in old age – a typical argument in favour of the liberal or residual welfare model. Due

not least to this competition among an increasing number of international and intergovernmental organisations, it has been suggested that for some of them ‘the game is over’. However, international organisations have a propensity to reinvent themselves, which, according to Marcussen, is precisely what the OECD has done (2002). Eventually the organisation developed two *additional* ideational roles, which currently dominate its functions.

Ideational agent

In playing this role, OECD is adopting ideas from its most prosperous member states, which it then links to specific areas of activity, further develops, and then transfers to less central countries. This describes how the OECD functions today. It seems to play a game that is defined by the countries that finance it – at present primarily the USA, which currently contributes 25 percent of the entire OECD budget. Japan contributes 24 percent and Germany roughly 11 percent. Together these three countries account for 60 percent of the overall budget. The OECD’s secretary general⁴ can hardly ignore this kind of fact in his strategic planning. When, for instance, the USA became displeased with OECD policies in 1995, it withheld its contribution for several months – an action that led to a budgetary collapse (Marcussen 2002: 148).

This deep asymmetry between rich (old) and poor (new) member countries, and between large contributors and the smaller ones, continuously reminds us that the OECD is *not*, at least not any more, a meeting place between equals. Marcussen illustrates how this affects policy by pointing out how the OECD has been shaping the ‘globalisation discourse’ (*ibid.*). The general focus in this broad discourse is the relation between processes of globalisation and national sovereignty; the main question is how globalisation might impact on the national decision-making processes and design of institutions. For instance, how does globalisation influence the scope and structure of unemployment benefits and old-age pensions?

Naturally, there exist a lot of different theories concerning the nature of globalisation and its implications for state sovereignty, not least due to the methodological challenges that such investigations raise. First and foremost: how should we define ‘globalisation’? How should the independent variable be operationalized? And how should we study impacts on the dependant variable, say, social policies? Even if we should find some noticeable changes in this area, might there not be causal mechanisms at work other than globalisation processes, for instance demographic changes, and new and varied patterns of family life? Causal mechanisms are complex and suggest effects in a variety of directions (Øverbye 2003).

Nevertheless, during the 1990s, the OECD developed and spread one particular interpretation of this relationship, namely the so-called ‘structural determinist globalisation thesis’. According to this, globalisation is construed as a huge threat to the national states policy-making processes and competing abilities. Consequently, the situation necessitates radical structural reforms of markets and welfare systems, and a

⁴ Donald Johnston (1996–)

‘sound’ macroeconomic policy. However, how could this neo-liberal interpretation of the effects of globalisation become so influential within the OECD, despite the noticeable lack of consensus among scholars on this issue? Those who have studied the change in the OECD’s ideological platform from the 1960s onwards claim that the OECD helped to spread this particular globalisation thesis when it was required to do so by the USA. US global leadership had been weakened after the end of the Cold War, and the president needed an organisation to diffuse a particular ideology that would be conducive to the US role as coordinator of macroeconomic policy strategies at a global level (Marcussen 2002: 148–173).⁵ Thus, a new growth policy emerged that focused solely on the structural rigidities of the capital and labour markets and the counter-productive effects of tax and welfare policies and other ways of regulating of the economy. Gradually European leaders came to share this diagnosis. The OECD’s acceptance of both the neo-liberal interpretation of the globalisation process and the role as ideational agent is clearly expressed in the present secretary-general’s motto, «*Globalise or fossilise*», or as he also formulates it, «*Evolve or die*» (Johnston 2000).⁶

The role as an ideational agent, which allows powerful member states to exploit international organisations to diffuse certain specific ideas, obviously undermines the picture of the OECD as a science-based think-tank. The same may be said about the other role that the OECD currently plays in the idea game, that of an ideational agency.

An ideational agency

What this role implies is that the OECD constantly surfs around in national political debates, searching for new products and new markets like any transnational company. When the OECD discovers that a set of ideas has gained ground among the member states, it adopts and operationalizes them, thereby transforming them into causal ideas that can be resold in the member states at a high price. Credibility is gained by constantly helping member states to concretise and implement diffuse ideas. In studying the OECD playing this role one may very well understand why international organisations so rarely die away (Strange 1998). Each time an international organisation confronts a new crisis it is able to reinvent itself in a new form that is well-fitted to the political context. Why should anybody wish to strangle an organisation that provides just the kind of goods and discourses that are in immediate demand in the member countries? Nevertheless, this conduct does not answer the question of what *actual authority* the OECD has. Does the organisation have the authority that a multilateral surveillance based on soft regulation and various forms of moral pressure requires?

⁵ This globalisation thesis was originally launched at the G7 forum.

⁶ «Now, as we enter a new millennium we see a world captured by the reality of ‘globalisation’. Those who do not adapt quickly to this new environment will find it hard to survive. Those who adapt will lead the world into the 21st century» (*ibid.*).

The ideational authority of the OECD

The question of the OECD's actual authority is complex. However, some methods may at least help to clarify certain aspects of the answer. The aim of the COST-study was twofold: to evaluate the *consistency* of OECD recommendations, and to evaluate their *effectiveness*, i.e. does the OECD have any short-term policy effects on member states? (see p. 9).

By studying the OECD's problem-definitions, its criticisms and recommendations to 14 European welfare states over a 30-year period, and contrasting these with the reforms that were actually implemented in these countries, the research group was able to conclude that the *consistency* of the OECD recommendations is very high, while the *effectiveness* of the recommendations is rather low. These findings may be closely interrelated: a precondition for the consistency of the OECD recommendations, which is based on some sort of common understanding among representatives of national governments, may be the actual restricted efficiency of them. However, irrespective of how this findings may fit together: the OECD does not seem to be a powerful international agent of policy transfer.

The *consistency* in the recommendations offered to the different welfare states is undeniable (Armingeon 2003). In the early 1970s, the main general advice given by the OECD to national policy makers was to apply macroeconomic demand management. This advice changed dramatically after the mid-1970s. At that time the organisation stopped recommending the use of fiscal means to fine-tune the business cycle, and since 1980 proposals that are incompatible with supply-side recipes have vanished from the Economic Surveys. Our primary concern was however with welfare policies, and it was only after the mid 1980s onwards that the organisation began to address health, pension and education policy. Even so, the issues were still only discussed with regard to their direct economic implications; indirect effects, such as their possible contribution to a functioning welfare state, or to sound economic development, are never examined. Neither are non-economic considerations, such as the avoidance of poverty and major social conflicts, or the contribution to democratic stability. Poverty is effectively a non-issue; it is only discussed in the surveys for Ireland and the UK. Hence, the welfare state with its non-market institutions and goals is conceived mainly as a burden to the economy. These findings are of significance for the conclusion that the OECD tends to promote uniform ideas for all countries.

On the other hand, the *effectiveness* of those recommendations seems correspondingly low; direct consequences of OECD recommendations on national welfare reforms is hard to discern. Certainly, if we consider the matter in terms of a criterion of 'concordance', this conclusion seems unconvincing since several countries have implemented policies that correspond to the OECD recommendations. However, the realities are complex and the picture of concordance may have been caused by a multitude of factors. For instance, it may have been caused by other international organisations than the OECD, pursuing similar ideas such as the EU, which influence was evident in various national welfare discourses. Other factors may be domestic concerns and reasons for reform. Domestic policy makers are generally aware of changes in demographic structure and the pressures these exert on pension schemes,

and their reactions to such challenges may be quite independent of warnings issued by the OECD. Furthermore, our study displayed many examples of policy changes that were under way long before the OECD offered their recommendations, such as the health care reform in Germany, which was passed by the parliament some time before the OECD published a corresponding reform proposal in its survey. Consequently, the criterion of ‘concordance’ does not give us any indications of causal mechanisms – on the whole it is rather complicated to establish if, and in what way, the OECD country reports have been influential.

This diffuse picture regarding the authority of the organisation may be illustrated by the Norwegian case. Norwegian governments, whatever their political colour, have always regarded cooperation with the OECD as a high priority. Even so, the fact that for the past 30 years Norway has had a petroleum-based economy has made it seem reasonable for the country to pursue other economic and social policy solutions than those proposed by the OECD. Thus, public and social expenditure has not been cut to the extent recommended by the OECD, and the welfare state has been expanded despite the organisation’s advice to the contrary. Nevertheless, although the Norwegian social political reforms have been far less drastic than the OECD’s proposals, the overall convergence trends still indicate some degree of accord between the OECD and the various Norwegian governments. The OECD clearly represents an important reference point and a source of support and advice in the development of government policies, although at the same time it is a voice that is often disregarded or given only half-hearted attention (Kildal and Kuhnle 2003). In other words, the picture is quite indistinct.

This leads to another method of assessing the efficiency of the OECD proposals, namely to map the explicit references to the OECD in national political processes. If the OECD is an important force for change, we should expect it to be referred to in debates on major policy issues. However, the country studies show that the OECD tends to be referred to more as a source of trustworthy data and descriptions than as an authority that influences important policy changes. Thus, even if the OECD is referred to and sometimes invoked in support of arguments offered in national debates, it does *not* seem to be an authority that automatically confers weight on arguments that might affect major policy issues.

Some preconditions for policy transfer

This brings us to the last section of this presentation, which concerns the preconditions for the OECD’s ideational influence on national welfare states. Considerable light can be thrown on these preconditions by analysing cases of discordance. While cases of concordance may be questionable, due to the complex causal mechanisms involved, cases of discordance indicate resistance to OECD advice. This is confirmed in our study: cases of discordance appear in policy fields where the OECD recommendations challenge the most important domestic political institutions, or where they are inconsistent with a nation’s political culture (Armingeon 2003; see Rothstein and Steinmo 2002).

Generally speaking, policy proposals likely to result in growing inequalities in income or basic opportunities (for instance educational) tend to be opposed in countries where equality is a broadly accepted societal norm, such as the Scandinavian countries. Proposals that favour decentralisation and greater flexibility in wage bargaining are most frequently opposed in countries with strong trade unions and with traditions of centralised wage bargaining (Belgium, Denmark, Germany, Finland, France, Greece, Italy, the Netherlands, Sweden). Our OECD study contains many examples that support an institutionalist interpretation of the preconditions for influence by international organisations. Since the normative basis of national welfare institutions is firmly rooted in the society's general value structure, which is generally backed up by strong political coalitions, it is unlikely that criticism and arguments presented by a remote international organisation will cause major changes (Armingeon 2003). In sum, concordance occurs in those areas where there is little distance between the OECD and national traditions regarding values, ideas, and ways of thinking in general (Börzel and Risse 2000).

Consequently, in the conclusion to our COST study, we state that there is no evidence to support the notion that the OECD produces plans for policy changes that can easily be introduced into national political agendas. Rather, the organisation's impact is more contingent. Policy proposals seem to have a chance only if they resonate well with national politics, institutions and broadly held values, which, parenthetically, is no evidence to support the notion that the OECD is efficient only in countries which pursue neo-liberal politics. However, even if the conditions of compatibility between the OECD recommendations and collectively shared ideas and meaning-structures on the national level, are fulfilled, the OECD's possible ideational impact will nevertheless be hard to distinguish from influences from other sources. The EU for instance, is an international actor that the OECD works closely with, and which policy for economic integration supports the OECD recommendations. Obviously, the fact that certain policies look alike is no evidence of a direct transfer.

In other words, our data gives no backing to the fears that are often heard today, that the OECD is a neo-liberal threat to the welfare state, and that it may cause convergence in the form of a common 'race to the bottom'. On the other side, the OECD is not without relevance for national politics. It is still an important source of comparable statistical data on socio-economic variables, which is widely used by national governments, and it offers ideas, analyses and descriptions for the national debates on policy development. Thus, the OECD committees may produce ideas and policy analyses that seep into member states' national policy debates without leaving clear traces of their original source. Even if the OECD does not have a direct impact on national social policy development, it is influential in a more indirect way, which makes it rather problematical to draw any firm conclusions about the significance of the OECD for national policies.

Although the study of policy transfer is fascinating: it connects with goals of social improvement and addresses questions of communication and dialogue between societies, the field is rather vague. The big challenge is to distinguish policy transfer from other sources of political change and from the rest of the traffic of ideas that takes place between countries. Yet such studies are sure to become increasingly important in

the future. Not only will the body of international actors, and the individual countries propensity to join them, increase. It is also likely that the transfer of ideas to these countries increasingly will take the form of coercive imposition rather than so-called ‘voluntary lesson-learning’ (Dolowitz 2003). Not least due to the fact that unilateral action by *one* state generates consequences for other states, the interest in coordinating policies is likely to expand in order to compensate for or avoid negative effects.

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