32

Introduction: Ideas, Expert Networks and Migration

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Social policy in general is devised and regulated by the nation state. This explains why, in turn, the development of social policy concepts and ideas for a long time has been studied within national contexts and attributed to the national sphere and specific individual and collective actors such as politicians and labour unions. While this may be very much in line with the ways in which social policy is explained by decision-makers to the population affected by the measures, it is not accurate. In fact, social policy development and the diffusion of discrete instruments are driven by the exchange of ideas that occurs across national borders (Dobbin et al. 2007; Gilardi and Wasserfallen 2019; Kuhlmann et al. 2020). Recent research has emphasised that a national perspective is insufficient when it comes to social policy development. More often than not, the ideas that shape social policy as well as discrete policy measures are transnational in origin: they are conceived beyond national borders

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and are the results of complex processes that include but are not limited to dialogue, emulation and learning (Rodgers 1998; Kettunen and Petersen 2011; Gingrich and Köngeter 2017; Kuhnle et al. 2019). As a matter of course, nation states in their search for solutions to social problems and social imbalances tend to look to other national contexts that have dealt with comparable issues and devised effective policy instruments in response. This is especially the case during crises that put particular strains on nation states and created pressure to act; the Great Depression is an outstanding example here (Patel 2016). This search may also be a search for possible improvements to existing measures and be focused on new adjustments, concepts and nomenclatures (Béland and Petersen 2015).

Furthermore, research that emphasises the transnational in social policy enables us to put the national dimension of the policies into perspective. This not only shows *that* but also *how* nations eager to create internal social balance and to provide security against the risks of life in an industrialised society have embarked on processes of exchange of ideas and transfer of programmes across borders in the past and the present. State sponsored trips by officials to study foreign social policy and the import of relevant literature are just two examples that were used by different nations at different points in history. Over time, transnational expert networks and globally communicating epistemic communities (Haas 1992) emerge as a result. Therefore, while the dynamics and flows of these exchanges lead us to re-examine the development of the nation state in the nineteenth and twentieth century, they also are significant for our grasp on social policy formation that is yet to materialise. For example, the needs of aging societies with precarious demographic developments are prompting new social policy legislation in most nations of the Western hemisphere, and we can expect nations in other parts of the world to follow suit as soon as their populations enter similar stages (Liu and Sun 2016). In this way, the analysis of the development of social policy ideas adds to our knowledge of what has been called the “prehistory of the present” of the welfare state (Conrad 2013, 555) and informs our understanding of the directions it still may take.

The welfare state may be called a European invention (Kaufmann 2012), and in fact, Europe, and in particular Western Europe, has been at

the centre of many transnational social policy exchanges for a long time. Shared intellectual influences and historically established connections helped to establish the welfare state and its instruments in other parts of the world. Thus, the United States and pioneering Latin American countries progressively introduced social policy in the early twentieth century that in part has been seen as a response to domestic developments and pressures (Mesa-Lago 1979). In Asia, Japan was the pioneer who introduced European inspired social security whereas nations such as South Korea and China introduced extensive social policy only more recently in times of profound financial and economic crisis (Kuhnle et al. 2019). And African nations had, at least in part, inherited European social policy ideas from the colonial powers which had governed them and then transformed these ideas, whenever feasible, according to national needs.

It is important to note, however, that the search for social policy concepts in general is guided by previously established connections; these connections are the result of other developments over time such as colonialism. Also, in the late nineteenth century the expansion of transatlantic trade and the movement of people fostered the creation of the North Atlantic as a distinct physical and intellectual space of interaction. While it supported economic activities, and set goods and people in motion, it also created possibilities for the exchange of ideas. Thus, in the United States, “the reconstruction of American social politics was of a part with movements of politics and ideas throughout the North Atlantic world that trade and capitalism had tied together” (Rodgers 1998, 3). Within this new space “a new understanding of common histories and vulnerabilities” emerged (Rodgers 1998, 33), attracting travellers as well as students who flocked to European institutions of higher education, and universities in particular. Members of highly transnationally professional groups such as doctors, architects and military officers as well as groups of actors with specific interests in social policy such as educators would travel back and forth, taking social policy ideas and literature with them. Moreover, the nation states were interested in showing off their latest social policy achievements which they presented at world fairs, international congresses and other venues that functioned as spaces for exchange. Thus, social policy left national contexts and became the object of transnational representations.

Neither the space itself nor the connections have been static but changing over time. The connections included other parts of the Atlantic and the Americas but unravelled after World War II. Nevertheless, the connections remind us of the relevance of such new spaces of interaction for any study of social policy development. Fittingly, the twentieth century saw the establishment of new connections via trade that expanded and transformed over time to include nations hitherto only loosely connected such as Germany and China (Leisering et al. 2017; Liu 2015).

New spaces attract and form new actors who, in turn, exert their influence on the development of these spaces. Students were especially important because they moved abroad and returned with new books, ideas and knowledge on foreign societies and the policies that were applied there. During the nineteenth and the first part of the twentieth century, the experts, as a matter of fact all male, came from a wide array of disciplines although physicians and lawyers were among the first to claim and to be granted this special position. At a time when the term had not yet been born, experts already were a vital part of the history of the welfare state as highly influential actors who shaped the new national institutions and worked on the political measures (Rinke and González de Reufels 2014). According to their own view, they served their nation to the best of their abilities and knowledge, while they also were striving to increase this knowledge and introduce ideas that had been developed elsewhere. To this extent, the expert can also be considered a key figure in the transnational acquisition and diffusion of relevant knowledge in the field of social policy.

Because the movement of ideas is not limited to but a vital part of the movement of people, migration can be considered a major factor in shaping the consecutive emergence of discrete social policy measures in different parts of the world. Migration is part of the process of the transfer of social policy ideas, and it occurred outside the arena of expert knowledge. It is rather the experience of migrant workers that influences the emergence of social security systems in other parts of the world and is a central driver for economic development (Bastia and Skeldon 2020). The labour movement has globalised through migration and carried the interests of workers as well as the ideas of trade union and party organisation to the Global South. In addition, migration is an important part of the social question (Hoerder 2002, 344–365).

Migration triggered social policies that dealt with the consequences of the arrival of new people during the age of European mass migration as well as in the more recent past: whenever people cross borders to make their lives in new places they pose special challenges to welfare that has to accommodate new arrivals and their needs. Today, the direction of migration runs predominantly from the south to the north. Highly qualified physicians and other professionals are leaving their native countries and emigrating to Europe and the United States. Between Eastern and Western Europe, especially in the area of long-term care, migration chains, called care chains, have developed. Social services as a central component of the welfare state often rely heavily on a migrant labour force (Yeates and Pillinger 2019). Migration movements shape social policy at least threefold: on the side of problem situations and social risks, on the side of the diffusion of ideas and, thirdly, on the side of the workforce that implements social policy programmes professionally. This final part of the volume intends to highlight new and relevant transnational spaces and impulses for social policy formation and to direct attention to the actors who have moved within them.

The following eight chapters deal, in turn, with different time frames and examine social policy fields such as health and labour in particular. *Tao Liu and Tong Tian* examine the complex process of how the People's Republic of China sought to learn from Germany to develop a new scheme for social protection that would take the place of measures that were no longer adequate for a rapidly changing economy and society. Policy transfer and policy learning is furthermore studied by *Johanna Fischer, Hongsoo Kim, Lorraine Frisina Doetter and Heinz Rothgang* for Germany, Japan and South Korea, three countries that established long-term care insurance in the final decades of the twentieth century and the early 2000s, and were weighing different options against a varying backdrop of domestic needs and foreign ideas. *Monika Ewa Kaminska* analyses the development of social health insurance in Eastern Europe after the collapse of the USSR and the end of communism by tracing the influence of a wide range of German experts and knowledge that superseded advice by a supranational organisation like the World Bank. In the following chapter *Ulrich Mückenberger* studies how the still on-going process of establishing gender equality in the field of labour has been advanced since

the early twentieth century in transnational forums of debate and by collective actors such as the International Labour Organization (ILO). *Teresa Huhle* examines the impact of European immigrants on social policy development in Uruguay, a pioneer in this field in Latin America, and stresses their role in a decisive phase of policy formation. *Tao Liu and Tobias ten Brink* study the groundwork for social protection of migrant workers, a highly vulnerable group, that was laid in the PR of China under Mao, and how these protection schemes, whose reach has remained limited, were reformed during two important phases of economic change. *Friederike Römer* explores the concept of welfare rights and studies its relevance for the assessment of the situation of non-Western immigrants in Western countries by using comparative data for twenty-five OECD countries that shows significant differences between countries and over time, raising questions about the protection welfare states are willing to provide to migrants. Finally, in the last chapter *Karin Gottschall, Kristin Noack and Heinz Rothgang* study how the introduction of long-term care insurance in Germany paved the way for care chains and sustained circular migration from Eastern European countries, which is an unintended and unforeseen effect of a new social policy measure that has become highly dependent on the influx of foreign female care workers.

Acknowledgements This chapter is a product of the research conducted in the Collaborative Research Center “Global Dynamics of Social Policy” at the University of Bremen. The centre is funded by the Deutsche Forschungsgemeinschaft (DFG, German Research Foundation)—project number 374666841—SFB 1342.

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