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## Stirring the Lions: Strategy and Tactics in Global Higher Education

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## 1. Introduction

In many parts of the world, higher education is viewed as a prime 'motor' for the development of a knowledge-based economy. Under the banner of this 'new economy', higher education policies, programmes and practices have been increasingly co-opted and shaped by wider geo-strategic political and economic interests. At both national and regional scales, higher education has become firmly incorporated into a neo-liberal discourse of 'global competitiveness'. The impact of this policy discourse on higher education systems has varied, due to the differing positioning of interests in the global economy, the varying ways the higher education sector is deployed to generate economic value, and because of the specific nature of the interdependencies between these national and regional economies. Research studies and policy analyses, however, still tend to deny the global interconnectedness of these policy developments, viewing higher education in nationally or regionally-specific terms, or using simple typologies which reduce higher education systems to, for instance, 'exporting' or 'importing' nations (see OECD, 2004). In our view, these approaches limit our understanding of the close and complex articulations and interactions between higher education sectors, economic policies, and regional interests that are generated by multi-scalar competitive strategies and global influences on higher education.

In this paper we explore three, interlinked, higher education policy spaces—in Europe, the United States, and Australia. We begin with the European Higher Education Area, outlining the key features of the competitive European project in higher education. We trace how the multilateral Bologna Process to create a unified higher education architecture in Europe has been re-shaped and re-directed by the EU's Lisbon 2000 strategy for competitiveness and the re-launched Lisbon 2005 agenda. We argue, firstly, that the revamped Lisbon strategy has confirmed a neo-liberal language of economic competitiveness in higher education policies at the European level. Secondly, we demonstrate how this agenda has allowed higher education to be co-opted as a platform for the European Union's wider regionalising and globalising strategies. This section of the paper shows how higher education has become strategically important for the European Union in creating both 'minds' and 'markets' for the European knowledge-economy.

Next, we explore how the growing range of educational initiatives at the European-level has affected – both directly and indirectly – American and Australian policymaking in higher education. The regionalising process in higher education that is promoted by European-level actors has created a stir in the United States and Australia, which have traditionally had the lion's share of the higher education export industry. Their actions and reactions, however, are complex, and shaped by endogenous as well as exogenous interests (Quintin 2006; Ferrero-Waldner 2005). In the case of the USA, the effects are indirect: the emergence of the European Higher Education Area legitimates crisis talk and policy intervention by the US federal government in order to enhance global competitiveness. The USA's international strategy is largely shaped by its concern to ensure the flow of talent to the USA and to retain those minds for research and development. In Australia, the developments in Europe directly challenge Australia's economic dependence on international student markets, as well as the country's ambition to provide globally-oriented and -recognised qualifications. While also concerned with the development of globally-competent citizens, Australia's interests are primarily shaped by the need to protect its international markets. The European competitive strategy for the world's minds and markets in higher education thus challenges the US and Australia in different ways.

In the final section, we examine how internal pressures in the three regions have coincided with these external influences and relations to create a critical 'tipping point' in global

understandings of international relations in higher education. The European higher education project, which is increasingly perceived as having some significance to the global economy, has set off a series of dynamic reactions in both Australia and the United States, which is leading to multiple new logics and new imaginaries about the global higher education landscape. Through this, a more integrated and relational global system of higher education is emerging. We conclude by suggesting that the European developments and the international responses to them are consolidating the trend towards a highly-stratified global market of higher education, and we present some of the differential effects at various levels of the emerging hierarchy.

## 2. The 'New' and Competitive Europe Goes Global

The creation of a coherent and more competitive Europe had its antecedents in the 1950s, and higher education initiatives played an important role from the beginning (Corbett 2005; Hingel 2001). However, from the 1950s until the early 1990s, the EU's higher education project was entirely regional in its focus, politics and outcome. With the notable exception of the United Kingdom (and to a lesser extent France and Germany), the "internationalisation" of study programmes, curricula, student mobility, and research career paths were primarily oriented toward European partners and Europeanising processes. Key markers during this period were: the institutionalising of regular meetings between the European education ministers; the eventual creation of the European University Institute in Florence in 1971; and the establishment of the EU's Erasmus mobility programme in 1987. The main policy aims embedded in these European-level initiatives were to produce European-minded citizens, engaged with the expanding Community (and European Commission), and who were committed to the concept of "European" culture and values. Delors however also "...had a highly developed idea of education and the part it could play in his strategy for advancing European integration via the single market" (Corbett 2005: 121). Thus, two concerns came together, which it seemed higher education programmes could mediate: how to create a European Single Market on the one hand and a European citizen on the other. Harnessing both minds and markets to the European project was viewed as essential in combating the narrow nationalism that appeared antithetical to the European Commission's territorializing project.

In 1992, a single market and European Union were announced by the Treaty of European Union, signed at Maastricht by the Heads of the European Community's member states. The Maastricht Treaty acknowledged the European Union's direct role in education, while attempting to circumscribe tightly the European Commission's room for manoeuvre by restricting European-level action to "supplementary" activities. While the Maastricht Treaty appeared to suggest that the EU's role would be modest, the European Commission under Delors clearly had ambitions to develop a more comprehensive policy for higher education at the European level. The 1991 Memorandum on Higher Education shows that higher education "...had already become part of the Community's broader agenda of economic and social coherence" (Huisman and van der Wende 2004: 350). The Commission quickly made an internal assessment of the EU's programmes and developed a new strategy to exploit the opportunities opened by the Maastricht Treaty's acknowledgement of the 'European dimension' in education. The Commission also began to look outward beyond the region, establishing higher education collaborative programmes with non-EU countries. Initiatives included the ALFA programme in Latin America, the expansion of the Tempus cooperation programme with neighbouring countries,<sup>1</sup> and the Asia-Europe Link through

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<sup>1</sup> Tempus provides a framework for cooperation and capacity-building projects in higher education in the Western Balkans, Eastern Europe, Central Asia and the Southern Mediterranean rim

university partnerships with ASEAN members,<sup>2</sup> although initially these 'external' activities were not well-coordinated with the emerging policy programme for education within Europe.

Throughout the 1990s, momentum continued to build, as European-level programmes and networks became more firmly established, and eventually brought together under the Socrates Framework. In 2000, the European Union's educational activities were given a significant boost by the 'Lisbon Strategy', part of the EU's wider economic platform, which famously declared: "...the European Union must become the most competitive and dynamic knowledge-based economy in the world capable of sustainable economic growth with more and better jobs and greater social cohesion" (European Council 2000). The Lisbon Strategy provided a mandate and agenda for extending the reach of Europe's policy responsibility deeper into national territory – education - and also outwards to the rest of the world. Situated in a context of increasing global competition for minds and markets, the Lisbon Strategy confirmed (and required) a neo-liberal understanding of higher education's contribution to the socio-economic well-being of the region. In January 2000, upon the proposal of the European Commission, a decision was taken to establish a European Research and Innovation Area (ERIA), with the principal, explicit objective of supporting the knowledge-based economy on a European scale – the so-called "Europe of Knowledge".

The Lisbon 2000 agenda for higher education was paralleled by the Bologna Process; a distinctive and ambitious project driven by national governments and other key stakeholders to create a common architecture and a European area for higher education. The Bologna Declaration (1999) committed an initial set of 29 signatory countries to six "action lines" directed towards establishing a European Higher Education Area (EHEA) by 2010. Within this 'Area', staff and student mobility was to be enhanced by the alignment of national quality assurance, compatible degree structures, the adoption of a credit transfer system and a common way of describing qualifications, outlined in a personal "diploma supplement". The Bologna Process is a voluntary international agreement, situated outside the European Union's governance framework, although it is largely driven by EU interests and promotes many initiatives (such as the ECTS credit system) originally piloted by the European Commission (Keeling 2006). "Convinced that the establishment of the European area of higher education required constant support, supervision and adaptation to the continuously evolving needs" (Bologna Declaration 1999), the European education ministers decided to meet regularly to assess progress, transforming the Bologna commitment into an ongoing policy Process.

Since 1999, the membership of the Bologna Process and the associated European Higher Education Area has since dramatically increased, from the initial 29 signatories to include 45 countries in 2005, and now incorporates around 5,600 public and private institutions hosting 16 million students. The European Higher Education Area includes Russia and southeast Europe, extending far beyond the European Union as a constitutional entity. It has been suggested by some commentators that the Bologna Process is playing a strategic role in: (i) limiting the encroachment of foreign, for instance USA-based, private higher education providers into territories that border the EU (Scott, 2002); (ii) expanding the pool of educated labour beyond the EU boundary; (iii) providing a template for quality for public and private higher education institutions in these post-communist countries (Fried, Glass and Maumgartl, 2006); and (iv) giving additional dynamism to the process (Tomusk, 2004: 86). In the Bologna policy documents, the EHEA is conceptualised as a vast

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<sup>2</sup> The Association of South East Asian Nations (ASEAN) includes Singapore, Thailand, Vietnam, the Philippines, Malaysia, Laos, Indonesia, Cambodia and Brunei Darussalem (Myanmar/Burma is excluded from education cooperation arrangements with the European Union).

reservoir of talent for the economy and as a vehicle through which a coherent 'European' sensibility can be built. The intention is to make European higher education intelligible as a single system (rather than the sum of many), thus improving its "attractiveness" and global profile as a destination and market for international students.

The Lisbon 2000 agenda situated Europe firmly in a world of heightened global competition for skills and markets, with an increased need for rapid innovation, flexibility and creativity. The 'crisis talk' in the region provided a mandate for the EU to pursue more explicitly a globalising discourse and set of projects. The Commission was not slow to argue that European-level action was needed to deliver on the challenges that globalisation presented. In a speech delivered in 2003 to the opening of the World Education Market, Viviane Reding, Member of the Commission responsible for Education and Culture, laid the basis for 'making the EU a prominent figure in the world education market' arguing that "...national governments alone cannot meet the challenges of globalisation, new technologies and the single market" (p. 2). From 2003, a suite of programme initiatives were launched by the European Commission, characterised by a strong emphasis on global competitiveness. This included the recruitment of student talent from around the globe (through the Erasmus Mundus global exchange programme), and the marketing of the European Higher Education Area globally through 'Tuning', 'Asia-Link' and other collaboration and promotion projects with the higher education sector.

These globally-oriented higher education initiatives were given force, focus and legitimacy following the Mid-Term Review of the Lisbon strategy chaired by Wim Kok (European Commission, 2005). Kok (2004) concluded that the Lisbon 2010 strategy had failed to deliver satisfactory economic performance and that Europe was far from achieving the socio-economic improvements that the Lisbon strategy had promised. Kok announced that Europe was falling rapidly behind both the USA and Asia. The spectre of China and India, as both threat and opportunity (Kok 2004: 12), was now added as a critical new dimension to Europe's external challenges. For Europe to compete, Kok argued, Europe needed to "...develop its own area of specialisms, excellence and comparative advantage which inevitably must lie in a commitment to the knowledge economy in its widest sense" (Kok 2004: 12). The Presidency Conclusions of the European Council in turn acknowledged the mixed results of Lisbon, and called for urgent action, endorsing the Commission's proposed 'new' Lisbon Strategy (European Council 2005: 3), which redirected attention almost entirely to "jobs and growth". The Lisbon 'Mid-Term' Review enabled the European Commission to play up and play upon the discourse of crisis to lever in a range of new initiatives that not only called for reform of the higher education sector (EC, 2005d), but directed policy attention almost entirely towards investment, innovation and jobs (EC 2005a: 4; Collignon 2006)

The 'new Lisbon' strategy – by promoting "less, of the same" (Collignon 2006) – firmly embraced a neo-liberal vision of how the European knowledge-economy could be enhanced, in which higher education was represented as critical. The European Commission (2005a) saw universities' role in the production of a European knowledge-economy as derived from and dependent on their relationship to industry (hence the heightened concern with "knowledge transfer"). Universities were nonetheless recognised as key institutions in the new strategy (European Commission 2003), and integrally and directly incorporated into the EU's overall reform agenda. Universities' operations, governance and incentive structures, and not just their educational and research outputs, became a matter of European-level policy concern. One week after the March 2005 meeting of European Council, Commission President, Jose Manuel Barroso, delivered a stirring speech to the higher education sector at the European University Association convention in Glasgow, entitled 'Strong Universities for Europe' (EUA 2005). Barroso

argued that the state of education in Europe, compared to other world regions, was nothing short of “miserable” (p.25).<sup>3</sup> In a new departure, the Commission began to give direct recommendations about how universities’ structures of governance, financing and research management (including performance measurements and incentives) should be “modernised” to enable Europe to contend in the global competition for minds and markets (European Commission, 2005b; 2006).

Supported by the invigorated Lisbon framework, the European Union also launched several more globally-oriented higher education initiatives, on both a bilateral and interregional basis. The Education and Training 2010 work programme (European Council 2002), which had undertaken to make European education a “world quality reference” was re-confirmed. Education became an important area of “sectoral dialogue” with a number of Asian countries, including China. The “Erasmus Mundus” global exchange programme, launched in 2003 with a budget of EUR 230 million for its first four years, included supplementary funding to increase participation by international students from specific Asian countries including India and China (the so-called “Asian Windows”). The EU’s global talent strategy also attempted to attract leading European researchers back to Europe, by refining the “Marie Curie” policy and programme instruments. In the EU’s 2007-13 Framework 7 programme of research funding, the international dimension was strengthened, with funds targeted at the “return and reintegration” of leading researchers who had been working abroad. Furthermore, students who had been studying in Europe for at least four of the prior five years became eligible to apply for fellowship funds from Marie Curie to continue research in European universities. The Commission, against much initial resistance, also developed a proposal for a “European Institute of Technology”, to “act as a pole of attraction for the very best minds, ideas and companies from around the world” (European Commission 2005a). Higher education, thus, became firmly incorporated into the European Union’s drive to improve its economic position and influence in the world.

### 3. The United States of America – Minds over Matter?

Many of the European researchers the European Union was attempting to lure back are currently based in the United States, which is well-established as the premier international destination for foreign students and researchers. The United States is home to many of the world’s leading universities, dominating the global rankings since the 1950s (THES 2006; Jiao Tong 2006; Graham and Diamond 1997). According to most commentators, “a performance gradient” continues to separate US research universities from the rest (Herbst 2004). Nonetheless, recent analyses reveal that other countries are rapidly catching up on a number of fronts (OECD 2006; THES 2006; Spellings Commission 2006), and that “there are alarming indicators of stagnation and actual decline” (Douglass 2006) in the US higher education sector.

Heated policy discussions at state and federal levels in recent years indicate how US academic observers and policymakers alike are becoming increasingly worried about their country’s global position in higher education (Douglass 2007). Representations of a system in crisis have become commonplace. Critical attention has been given by US commentators

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<sup>3</sup> Barosso at this meeting also stated: “...we can already see that universities in Europe attract fewer students and in particular fewer researchers from other countries than their US counterparts... And three quarters of EU-born students studying for their PhD in the US say they prefer to stay there after graduating... So, clearly, to paraphrase a certain Danish university student made famous by Shakespeare; something is rotten in the state of Europe’s research and education” (Barosso, 2005: 5-7).

to both systemic and institutional issues facing the higher education sector. However, the decentralised nature of America's multiple state educational systems, its regionally-based accreditation processes and the indirect role of the federal government (funding students and research, but not the systems or institutions which produce them) means that it is difficult to propose centralised or centralising political solutions to the sector as a whole. Furthermore, the exceptional diversity of US higher education is highly prized. Concern has consequently focussed on problems at the level of individual institutions. There is growing debate in the US about how to identify failing institutions, and about complacency and rising costs at more successful universities.

In response to these political rumblings, an independent federal Commission on the Future of Higher Education was appointed in 2006 by US Education secretary, Margaret Spellings. Intended to stimulate a "national dialogue", the Commission's final report proposed a number of far-reaching recommendations, including improving access and the transition from school to college, various "cost-cutting and productivity improvements", institutional benchmarking, the streamlining and targeting of federal aid, and the introduction of outcomes-based accountability mechanisms.<sup>4</sup> According to the Spellings Commission (2005), American higher education institutions have become "increasingly risk-averse, frequently self-satisfied and unduly expensive". The proposals centred on opening up access, information and financial support for higher education to a wider range of American families. Overall, the Commission's proposals were about the need to ensure quality and to adequately publicise outstanding successes and best practices, rather than about radically restructuring provision or programme structures within institutions as was occurring in many parts of Europe.

This contemporary higher education debate in the US must be viewed in the wider context of heightened American concern with the country's position in the world's "hearts and minds", and a strong political desire to regain international cooperation and confidence in its leadership, particularly in the wake of its bungled Iraqi strategy. Dubbed "educational diplomacy" by Richard Riley, a former US Secretary of Education (NAFSA 2003), the critical ambassadorial role of the US higher education sector in global affairs is frequently cited by political commentators. The critical reflections about American higher education which followed the Commission's announcements were therefore more about 'minds' than money, focussing on the sector's responsibility for developing an educated democratic citizenry, and on retaining its position as the leading intellectual destination for the world's brightest international students.

The two major policy priorities for US higher education within these recent political discussions are relatively simply defined: i) developing talent and ii) attracting talent. Clearly, the major priority is the widely-shared objective of *developing* the world's best minds. The American higher education sector is justly proud of its inclusive and democratic approach to learning, which accomplishes much of what Europe is now attempting to introduce. Participation rates in the general population are high, and high levels of both public and private funding combine to provide more investment per student than almost

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<sup>4</sup> From the outset, however, the Commission's work was dogged by controversy and a lack of consensus among its members. An incomplete draft report was released unexpectedly by the Chairman in June/July 2006. Its interim and partial conclusions, which were not approved by all members of the Commission, were harshly critical of the state of US education and caused an outcry throughout the sector. Several Commissioners publicly distanced themselves from the first draft, which was incomplete and without a conclusion. Discord continued until the submission of the Commission's final report. Significantly, David Ward, a key member of the Commission and President of the American Council of Education, the umbrella representative body for the American higher education sector, refused to sign the final document.

anywhere else in the world.<sup>5</sup> The American tertiary system is also noted for its inherent flexibility. Complex articulation and credit transfer agreements allow considerable inter-institutional and geographical mobility.<sup>6</sup> Consequently, American tertiary study, particularly at graduate level, has an enviable international reputation.

International comparisons with other systems have however encouraged political speculation about a growing “competency crisis” in the American population. The educational attainment rates among adults in the US have historically been extremely high (Goldin and Katz 2001), but other countries are increasingly perceived to be educating their citizens for longer, and better, particularly at the K-12 (school)-level (Spellings Commission 2005)<sup>7</sup>. Furthermore, tertiary participation and degree completion rates have either levelled off or are in decline (Douglass 2006; Weko 2004), as has the role of educational attainment in productivity growth (Douglass 2006)<sup>8</sup>. There is consequently broad-based concern about the ability of the American higher education sector to respond to the challenges of globalisation, new skill demands, the service- and knowledge-economy, and so on: “It’s time to be frank... American higher education... has yet to address the fundamental issues of how academic programs and institutions must be transformed to serve the changing educational needs of a knowledge economy...”, announced the Chair of the Spellings Commission in his draft report (Miller Report 2006). It has become a major point of political debate whether a US college education is delivering the necessary types of skills and general education required by twenty-first century citizens.<sup>9</sup>

As in Europe, there is growing acceptance by the higher education community in the US of the need for American college programmes to encourage awareness and understanding of the international environment in order to produce globally competent citizens: “to be fully educated, is to be educated *internationally*” (Riley, in NAFSA 2003). For example, the Lincoln Commission launched a drive for American institutions to send one million US students abroad as part of their studies. The US Department of State recently provided 2400 student scholarships for study abroad, and expanded the Fulbright programme – the objective being to develop ‘greater global competency’ amongst the American student body

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<sup>5</sup> The United States has a national participation rate of 34% of the student age cohort, nearing 50% in some states (Douglass 2006), strong involvement by older and ‘non-conventional’ students (nearly a third of enrolled students are older than 24 and 40% are part-time (Spellings Report 2006)), and a strong pedagogical commitment to “general education” components within the curricula (Assefa 2004). Furthermore, ‘lifelong learning’ is already a reality in the American workplace, with 35% of US employees engaging in job-related training, at a higher level of intensity than in most other developed countries (OECD 2006). Consequently, around 39% of the adult population in the US have benefited from further or college-level education (OECD 2006).

<sup>6</sup> Some 33% of all US bachelor degrees are earned at multiple institutions, while 28% of single-institution bachelor’s qualifications include some mobility (Adelman 2004).

<sup>7</sup> The variable quality of American school education, which is organised at the local-level and provided by thousands of autonomously-governed and -funded school boards throughout the country, and the decreasing numbers of high school graduates, particularly among minority groups, are issues of particular concern.

<sup>8</sup> The OECD suggests that if current trends continue, the US share of the OECD pool of highly qualified people will fall from 41% to 36% within ten years. Projected shortages in highly-skilled health service workers are a cause for concern giving an ageing population. Demographic pressure (resulting in an expanded student cohort) will also increase required steady-state funding by 7% over period till 2015, a higher projected increase than in any other OECD country (OECD 2006).

<sup>9</sup> A hot topic, in the face of falling literacy and numeracy levels among college graduates, is whether colleges are even providing the same quality of learning environments and teaching programmes as in the past (“there are... disturbing signs that many students who do earn degrees have not actually mastered the reading, writing and thinking skills we expect of college graduates” (Spellings Commission 2005, see also Adelman 2004; Bok 2006; 2007)

(Hughes 2006).<sup>10</sup> However, with less than 1.5% of all American students ever studying abroad, emphasis is being placed on the need to provide “internationalism at home”.

The second major priority for the US higher education sector is *attracting* the world’s best minds. American campuses are more thoroughly international than those in many other countries, in part due to the continually high levels of immigration to the United States.<sup>11</sup> The US also attracts large numbers of international students and researchers specifically for the purpose of study. By a factor of two or more, it is by far the most popular destination of internationally-mobile students, with 22% of the world’s foreign students (OECD 2006). This is, however, largely due to the overall size of the sector, and compares unfavourably with higher averages in many other countries.<sup>12</sup> Furthermore, in the years since 9/11, there has been a marked decline in international enrolments, particularly among Chinese students, with all major disciplinary fields showing a reduction in total enrolment (Council of Graduate Schools (2006a; 2006b). In a period in which the worldwide numbers of international students has grown, the US share has fallen.<sup>13</sup> Tighter immigration policies, and the strict limitations placed on research by international students in areas related to national security, are further reducing the attractiveness of US universities to talented foreigners.

International enrolments remain critical to the US higher education sector and to the American economy as a whole, to which foreign students contribute US\$12-13 billion annually (Prado Yepes 2006). A third those actively employed in the US with a doctorate in science and engineering are foreign-born. As is also noticed (with concern) in Europe, Europeans make up a significant portion (14%) of total international enrolment in the US. Nonetheless, with most US students also making a significant private contribution to their tuition costs, the benefits of internationalism are predominantly viewed as injecting *talent* rather than *dollars* into the system – “put[ting] the skills of the world’s best and brightest to work for America (Bush 2006). Many areas of study, and the US workforce more widely, are dependant on international brainpower.

The US policy debate over the best ways to develop and attract talent on its campuses does not generally reference the radical reforms which have taken place in Europe. The American higher education sector is not explicitly reacting to European higher education policy but to its position in the global higher education market more generally. The US proposals are, however, in many ways similar to the Bologna responses to global competitive pressures. US priorities include reducing barriers to credit transfer, assisting and promoting mobility, access and affordability, improving national accreditation process and quality assurance cooperation, and internationalisation. As with the European Lisbon agenda, higher education success is clearly associated with economic strength and competitiveness, and there are widespread calls for “a national strategy on innovation and competitiveness” which acknowledges the key role of higher education (CGS 2007).

Thus in some areas, the United States is taking a keen interest in the developments in Europe. The European developments are invoked by different stakeholders for domestic leverage in the US higher education debate. Admiration is also expressed for the rapidity

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<sup>10</sup> Nonetheless, such initiatives have recently been scaled back, as policymakers determined that outbound mobility of American students should be driven by ‘quality not quantity’.

<sup>11</sup> “Today, for example, 54% of undergraduates at the University of California have at least one parent who is an immigrant; some 25 % were born in another country” (Douglass 2006).

<sup>12</sup> Foreign students constitute only 3.4% of total tertiary enrolment in the US

<sup>13</sup> The drop has been from 25% to 22% (OECD 2006), although Council of Graduate Schools (2006a; 2006b) reported that total enrolment of international students increased in 2006 by 1% after three consecutive years of decline.

of the European changes and the strength of the political will back-grounding them (Jaschik 2006). The American Association of International Educators (NAFSA) has set up a Taskforce on the Bologna Process, and there is increasing interest at the institutional level about the new Bologna credentials and templates. There is, however, uneven acceptance of the new Bologna standards by American institutions.<sup>14</sup> The Bologna reforms have not brought about major changes to the way US institutions assess foreign degrees, and there is considerable lack of knowledge by admissions and credentials offices about the status of the new Bologna degrees in Europe.

A possible reason for this lack of understanding is because the challenges faced by the US higher education sector are quite different from those confronting European institutions. For many leading commentators, US higher education problems are primarily sourced in “unwarranted complacency” and “a remarkable absence of accountability” (Spellings Commission 2005; see also CGS 2007). Compared with Europe, research funding and institutional autonomy are not considered as pressing issues. With highly-developed college transfer arrangements (particularly with the way the community college system is integrated into the tertiary sector), US commentators are also not particularly worried about systemic diversity or mobility issues. In fact, Americans are often critical of the European concentration on these issues, and of the homogenising solutions proposed within the Bologna Process. For example, the Council of Graduate Schools critiques “Bologna uniformity”, pointing out that graduate admissions policies in US are diverse, because US graduate programmes are diverse; and that excellence may be encouraged by such diversity in approach (Denecke 2005). The Spellings Commission 2005 was obliquely critical of the risks of narrow disciplinary specialisation, of a ‘cafeteria’ approach to credit-based qualifications and of excessive mobility (Spellings Commission 2005).

The effects of the Bologna Process on the United States are difficult to predict, particularly as these pressures are only indirectly acknowledged in the US domestic debate (CGS 2007). The biggest challengers to the US in the international student market are Australia, Canada and the United Kingdom, who are “trying harder and without the distraction of large-scale military adventures abroad or the burdens of debt levels” (Douglass 2006). The improvements in Chinese and Indian higher education, research markets and national economies mean that these countries are also retaining an increasing proportion of their home-grown talent. The European Higher Education Area may end up challenging American dominance in international higher education in much the same way that the European Union has become a counterweight in international trade *vis a vis* the US and Japan (Sedgwick 2003) – with ECTS becoming an academic currency to rival the EURO in its effects.

US higher education strategies and responses remain predominantly about the “battle for the mind”, with attention directed towards developing the potential of America’s own citizens and attracting others to enrich the local intellectual environment. In the American view, “in tomorrow’s world, a nation’s wealth will derive from its capacity to educate, attract and retain citizens who are able to work smarter and learn faster” (Spellings Commission 2005). While the productivity of the labour-force remains central, the social aims of higher education still occupy a key position in US political understandings, evidenced in the policy debates over affirmative action, financial aid to students, and universities’ social mission and community involvement (see CGS 2007 for a manifesto on the importance of the “citizen-scholar” and “public scholarship”). The US aims to counter

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<sup>14</sup> In a Council of Graduate Schools survey (2005), 22 % of 125 institutions surveyed said they would not accept the three year European bachelor’s qualification as sufficient for entry into a US graduate programme; 64% said they would assess the European qualification for equivalency, while 9% would offer provisional acceptance with an additional coursework requirement.

international competition by attracting, developing and expanding the national pool of "people of talent and ambition" (Spellings Commission 2005 2006), and by attempting to encourage an appreciation for, and strong ties with, the country and its values. This positioning in the global higher education battles contrasts sharply with the Australian perspective, which views winning market dominance more clearly as a numbers game.

#### 4. Australia - The Market Challenge

In April 2006, Julie Bishop, the Australian Minister for Education, Science and Training, tabled a paper entitled "The Bologna Process and Australia: Next Steps". This official response to the Bologna Process claims that Australia must ensure compatibility to Bologna or face the risks associated with being "a Bologna outsider" (Bishop 2006). At first glance, this response appears to be an over-reaction. However, the Australian federal government is acutely aware of the global and strategic importance of higher education and its positioning in that sector.

Since the late 1980s, successive federal governments encouraged Australian universities to generate external revenue by promoting the recruitment of full, foreign fee-paying students so that by the late 1990s, education had become a major export enterprise for Australia. Indeed, higher education is frequently referred to as an "industry", and "...some individual universities have higher export turnovers than well-known consumer products" (Ziguras, Reinke and McBurnie 2003: 359). Many Australian universities have become highly dependent on the income generated from international student fees. From the 1990s to 2003, Australia's share of the international market grew from 1% to 9%, while full fee-paying foreign students now constitute one quarter of enrolments of all students in universities (Marginson 2007).<sup>15</sup> In terms of numbers, in 2005, 165,000 students enrolled in Australian universities from overseas, and of this figure, 32,000 (or 1/5th) came from Europe while the rest came from Asia. Not only has the number of Europeans doubled as a proportion of the growing pool of international enrolments, but European students tended toward a different discipline mix (Bishop 2006: 7). This means that growth is not only concentrated in areas like business studies, economics and so on, but is dispersed across a range of different subject areas in the institution.

The European higher education developments represent a major threat for a number of reasons. Firstly, there is a steady flow of students from Europe; being Bologna-compatible might enable and enhance this movement as students would exit an Australian university with a qualification that is easily accepted by the European labour market.

Secondly, the Australian government is well aware that the European Commission has used a number of instruments to create linkages and partnerships in the Asian and Latin American regions (Robertson, 2006) in order to advance EU economic interests. If Europe was to become a desirable destination for Asian students because of its competitive fee structure, status of universities, and the increasing tendency to teach in English at the graduate level, then Europe would threaten Australia's dominance in the market. In relation to the Asian region - the region of most strategic concern to Australia -the European Commission has used the Erasmus Mundus Asian Windows programme to recruit Indian and Chinese students to study for Masters' degrees in European universities. The Bologna Process has also been the main topic of conversation at a number of Asia-Europe meetings

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<sup>15</sup> In export revenue terms, this sector now makes a major contribution to the Australian economy. Australian Bureau of Statistics figures show that by 2002 education services exports brought in AUS\$4.1 billion rising to AUS6 billion in 2004. Education is also the third largest export services earner (behind tourism and transportation), and was the country's fourteenth largest export earner overall.

since 2005. Added to this, some Asian countries have been monitoring the Bologna Process closely, while China has sought observer status at the 2007 EU Ministerial meeting for Bologna. The Australian government represents the Asian region in culturally possessive terms - as 'our region' (see Bishop, 2006) - and one where Australia wants to protect its own interests. If any of the Asian (and indeed Latin American) countries were to adopt the European model, being Bologna-compatible would help secure Australia's position in the global higher education market. And, as the Australian Minister for Education Science and Training, Julie Bishop (2006: 9), notes: "The risk for Australia in the long term, if it were to remain a 'Bologna outsider' is that there is likely a tendency for relationships to increase between aligned systems at the expense of those with less compatible systems". Australia has clearly chosen not to be an 'outsider'. In April 2007, it signed a joint declaration with the EU to become Bologna-compatible and strengthen cooperation to cover issues of quality assurance, benchmarking and indicators, and qualifications frameworks (Joint Declaration, 2007).

Thirdly, in 1997, Australia and the European Union committed themselves to developing a closer relationship for a number of reasons: strategic economic (for instance to advance trade liberalisation agendas), political (security) and cultural (stability, human rights) (see Figel and Bishop 2007). Higher education is an important institutional sector in this process. Erasmus-like mobility programmes are being established between European and Australian universities (see EU-Australia Cooperation in Higher Education, 2005-6). A small number of students from European Member States are funded to spend around 6 months in Australia and vice versa. As with the Erasmus Programme in the EU, credit transfers become particularly problematic when the degree architecture is different.

Such programmes are seen by the Australian federal government as being critical to developing the new 'globally aware' Australian worker and citizen. In a press release in September 2006, Minister Bishop argued that "There is growing recognition in Australia of the benefits for our international relations and trade in developing a workforce which has the capacity to operate and engage internationally" (p. 3). Study abroad, as part of a programme of study, is also viewed as potentially attractive for overseas students and an experience they are willing to pay for. In 2006 the Endeavour Programme was launched to provide opportunities for the best and brightest of students to study abroad as well as to fund the best and brightest of overseas students to Australia.

In pursuing a 'Bologna-compatible' strategy, the Australian government risks alienating its academic community (including the Australian Vice-Chancellors' Committee, and the academic and student unions) and perhaps opening up the possibility that elite Australian universities take their own independent positions. In separate responses to the Minister Bishop's April 2006 paper, these interests have argued that the Australian government has been too ready to announce its interest in becoming Bologna-compatible, while not addressing adequately the risks of being too closely integrated into a system developed in Europe. They point to the considerable slippages at the present time between the aspirations and the formal architecture of Bologna, with what happens at the grass-roots within Members States and individual institutions. They also argue that close integration with Europe might undermine the autonomy of Australian universities, to pre- (or over-)determine forms of cooperation in the Asia-Pacific region that privilege Europe's one-size-fits-all model, and potentially undermine any competitive advantages that might accrue from being institutionally different. Rather than alignment based on 'compatibility', the AVCC, for instance have urged that alignment be based on 'comparability'. The AVCC also urged that Australian universities explore other potential regional processes, for example in the Asia-Pacific area (AVCC 2006).

Similarly the Group of Eight (the Ivy League of Australian universities) have expressed their concern about being locked into the European model with little flexibility and room to manoeuvre, and have become anxious about diplomatic problems which might arise with USA colleagues. Alliances with US institutions and articulation with US programmes are highly significant to many Australian universities and academics. In their submission to the Australian Department of Education, Science and Training, the Group of Eight argued that while Australia had close historic connections to Europe and more recent collaborations in Europe (such as the Group of Eight Australia Centre Europe in Berlin – established in 2004), the Group of Eight also had important connections to the Association of American Universities in the USA.

The Bologna Process and the creation of a European Higher Education Area has clearly inspired more strategic ways of thinking about regions and the value of creating and institutionalising the role of education in regional relationships. While education has been on the agenda in forums like APEC (Dale and Robertson, 2002), Bologna offers a different kind of imaginary, creating a regional higher education architecture which offers the possibility for a single market for higher education services and the potential to improve future employability. In April 2006, an inaugural Asia Pacific Education Ministers' meeting was held in Brisbane Australia. In the Brisbane Communiqué from the meeting, it was agreed that Asia-Pacific Ministers' of Education would explore quality assurance frameworks for the region; the recognition of education and professional qualifications; measures to improve mathematics and science teaching across the region; and, common recognition of technical skills across the region. Australia has also taken on a leadership role in the follow-up work to the Brisbane Communiqué, and is chairing the multilateral Senior Officials Working Group that has been charged with progressing the aims of the Communiqué.

These developments suggest that the Australian government and Australian universities are involved in a complex set of strategic positionings in order to manage the threat (and opportunities) posed by the rapid growth of the European Higher Education Area and the Bologna Process. Australia has been a leader in "market-making" strategies; its institutions enjoy considerable government support and access to strategic and tactical intelligence about developments in the global marketplace and how to respond to these. In purely economic/market terms, there are clear dangers in being incorporated into a European higher education project, especially when to date some of their market advantage as been the result of leading the field and making the market as they choose. The entry of the EU into this sphere has clearly 'tipped' the balance of the terrain in a very different direction. It is probably not possible to ignore these pressures - given the multiple ways the EU has been engaged in inter-regional projects in both the Asian and Latin American regions (Robertson, 2006), and the long shadow cast by China. The question remains how to respond in ways that is both strategic and tactical in terms of Australia's regional interests. Whichever way it goes, the higher education systems of nation states like Australia are being more closely integrated into the global and regional economies, making them both highly sensitive to, and thus also highly vulnerable to perceived threats and strategic developments in other regions.

## **5. Metaphors, Models, Minds, Markets: 'Capabilities' and 'Tipping Points' in Global Higher Education**

Our analysis of political strategies and tactics in the higher education in 'Europe', in the USA and in Australia, shows that we are dealing with a highly complex and interlinked set of processes and relations. In all of these geopolitical spaces, higher education has become

regarded as a critical 'motor' for national and regional competitiveness in the global economy, and a global battle has begun for the minds and markets to support this. It is evident that these national and regional higher education sectors have become more closely woven into the global system, though, as we have shown, the precise nature and consequence of that relationship varies as a result of their different histories, size and shape of their economies, geo-political interests, internal political arrangements, the specific nature of the higher education sector, the kinds of development strategies that are deployed, and so on.

We have explored the territorialising strategies of the European Union in higher education, looking at how the EU has firstly co-opted higher education as part of its regional project, and then exported the Bologna reforms to extend its 'spheres of influence' to other parts of the world. The EU's successful educational programmes initially provided a rich pool of experience, relationships, resources and discussions for new policies to draw on. The relaunched Lisbon competitiveness agenda gave these 'low-register' developments political traction, providing the mandate and the political philosophy for further progress, while the Bologna Process provided a range of useful tools. The EU is now pursuing two complementary internationalising strategies: firstly, attempting to make its model of higher education dominant in order to increase its overall market share of international higher education, and secondly, trying to harness more of the world's best minds to motor the European economy. Both of these objectives collide directly with the established interests of Australia and the United States in higher education.

As we have shown, the USA continues to dominate the international student market, with its primary interest being to attract, develop and retain talent for its research and other economic activities. The employment of the world's best 'minds' to produce innovation and generate value for the US economy is central to the USA's knowledge-economy strategy. However, as we have also argued, the US administration is also mindful of the way in which higher education—conceived of in ambassadorial terms and as a civilising force—can be deployed to mediate the foreign policy credibility gap that has opened up through its homeland security policies and the 'war on terror'. The rapid realisation of the European Higher Education Area has provided a useful lever for this domestic debate.

On the other hand, since the 1990s, Australia has vigorously pursued a policy of constructing the higher education sector as a market and exporting education globally. It has managed to secure a competitive position in this market at a time when many Asian countries were seeking to invest in higher education but had limited capacity to provide it for themselves, Australia was therefore able to use its regional location to advantage. Australia became a major supplier of education services within the region and its higher education institutions have became highly dependant on the revenue streams that this generated. For both the USA and Australia, there is much at stake for their (knowledge)-economies.

The question to be asked, however, is: why now? Given that both Bologna and the Lisbon Agenda have been on the table since the beginning of the decade, why have Australia and the USA responded in their different ways at this particular juncture? We believe that there are a number of interconnected reasons for this. The combination of the re-launched Lisbon 2005 agenda, the deployment of globally-oriented strategies that challenge the regional interests of the USA and Australia, together with the European Higher Education Area's astonishing achievements and size, represents a new material 'capability' and that, when added to endogenous dynamics in both the USA and Australia, a critical 'tipping point' has been reached, which is leading to a tighter integration of the global knowledge-economy.

We adopt here Saskia Sassen's (2006) definitions of 'capability' and 'tipping point'; to talk about how path-shaping changes occur and how new articulations of the higher education environment take shape. For Sassen, 'capability' and 'tipping points' are two key elements that enable us to examine foundational transformations in complex systems over time.

'Capabilities' are defined by Sassen as:

...collective productions whose development entails time, making, competition, and conflicts, and whose utilities are, in principle, multivalent because they are conditioned in the character of the relational systems within which they function. That is to say, a given capability can contribute to the formation of a very different relational system from the one that it originates in (p. 7-8).

There are several points to note here: Firstly, that capabilities are *produced* through discursive and material processes, as we see with, for example, the production of 'Europe', the production of the European Higher Education area, the production of a competitive US, and so on. They are, then, political projects. Secondly, the production of capabilities involves actors or institutions struggling over ideas, resources, embedding power in institutions and so on. These are dynamic, contingent and incomplete processes. As a result they are *fluid*. Thirdly, that power is *relational*; a capability has to be seen by others -as in our case the USA or Australia- as having some force or possible set of outcomes - even if that capability is amplified in others' imaginations and used for purposes that were not intended, such as endogenous changes. Its power derives from the fact that it *can have effects* on other systems. Fourthly, capabilities can include technological, organisational, and natural resources and, as such, they are *concentrations* of material and discursive power (Cox, 1996: 98). Finally, a given capability, can contribute to the formation of a very different relational system to the one that it originated in. Sassen argues that the Bretton Woods institutions—IMF, World Bank, later the WTO—came to have a particular kind of global capability from the 1970s onward with the collapse of the post-war settlement and the denationalising of states. Similarly, we might argue that the EU regionalising project is now contributing to the formation of a very different relational system—one that is both more global and also transforming national logics in other parts of the world.

The collective production of a more outward-looking, globally-competitive 'Europe' by European elites has considerably more material force than an insider perspective might grant it. Much of the capability of the European project is derived from its external appearance of coherence (or at least the coherence attributed to it by external commentators). Thus, the capability of the European Union is to some extent illusionary. In our view, it is still an open question as to whether the European Union will be able to direct policy and funding sufficiently to enable it to become a competing brand and a substantial threat to the other regions. A recent international 'student perceptions' survey (ACA 2005) shows that the European 'branding' of higher education has not been entirely successful. While Erasmus Mundus might make some inroads into this, and the Marie Curie instruments might act as a sufficient lure to bring leading academics back to Europe, the serious disjunctions between the newly re-imagined European knowledge-economy and the real multifaceted and multi-scalar economy of Europe will necessarily limit the impact and steering of Europe's higher education/knowledge economy strategy (see Robertson, 2007). There are considerable gaps - of capacity, capability and legitimacy - which hinder the EU's ability to have global impact through their higher education policy initiatives.

The dilemma for Australia is what to do about the new European capability; to stay outside of the Bologna model, or locate itself within? The USA, on the other hand, has been able to use the threat of the EU's capability and the position of US in the global economy to

legitimate a crisis discourse about "accountability" and "transparency" to push forward an agenda for change within universities. This has parallels with other examples of policy change being driven by "crisis narratives". Kelly (2001), for instance, shows how the Singapore government used the metaphor of "meltdown" during the Asian crisis of 1997 in order to promote a particular blend of policy initiatives. The EU has also used a discourse of crisis from 2004 onward to enhance its capability; by setting in train a range of initiatives intended to directly reshape the mandate and governance of higher education in Europe—including the identification and resourcing of an elite set of higher education institutions across Europe (for example, the EIT project and the European Research Council).

This brings in a second critical element for understanding the global changes; the idea of a 'tipping points'. Sassen (2006: 7) refers to tipping points as:

...identifying the dynamics involved in capability switching relational systems and/or organising logics. That is to say, this type of analysis can accommodate the fact of tipping, or the 'event'...rather than being confined to an outcome (p. 9).

To identify the 'tipping point', we need to look closely at the dynamics, the mechanisms, the act, the event; the processes, that are involved in shifting the register of effect so that there is no easy turning back and a new logic is set in train.<sup>16</sup> It is where in certain circumstances quantitative elements are transformed into qualitative change. A focus on tipping points would identify the dynamics involved that shifted or switched the post war logic to another. Second, tipping points are clearly related to capability—but capability is not sufficient on its own, as we can see with Europe.

So how is this concept useful in our analysis? We argue that the tipping point toward a more integrated assemblage of global higher education is made up of the following dynamics: an expanded Europe as a result of new accession countries joining; the insertion of a more assertive neo-liberal agenda in Europe following the Mid-Term Review of Lisbon; a single architecture for European higher education structured as a tiered system for global competitiveness; Europe's globalising interests in search of global talent including the return to Europe of researchers; the enmeshment of exporting economies like Australia in multiple world regions, including Europe; the emergence of China and India as potential markets and powers, and the strategic interests of all players in having a stake in Europe; endogenous politics in the USA where Europe's knowledge economy is amplified for its "shock value" which in turn gives Europe capability; the undiminished dependence of the USA on the steady flow of graduates from Europe as well as other parts of the world. The upcoming meeting of the European education ministers in London (May 2007) has bound these factors together into a critical "policy moment", when the viewpoints of stakeholders and observers will be formally articulated, positions will be taken, and policy responses formulated.

The tighter a nation is linked into the global economy, the more it will feel pressured to jump track into the new logic which is being produced. However, these switches are not automatic; they are the result of competition and conflict. In the case of Australia, its higher education sector is so deeply enmeshed in the regional and global economy that it is now faced with the momentus strategic reality of switching its internal logic—its relatively more flexible architecture of higher education—to accommodate to the reality of the new competitive Europe. However, there are internal conflicts and different parts of the sector are responding in different ways. The self-styled elite universities in Australia, such as

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<sup>16</sup> An example we might use to illustrate this point more generally is what Jessop (1999) has argued is the shift from the Keynesian Welfare National State that characterised the post World War II settlement to the Schumpeterian Post National Regime from the 1990s.

Melbourne, have tried to incorporate a dual logic—USA and Europe—into their ‘Melbourne Model’ (University of Melbourne 2006). In the US, disputes continue about whether there is in fact a “crisis” in higher education, and whether (and what type of) action is necessary (see for example, Newsweek global report 2003 and Economist 2006). The transaction costs of adapting to, or of ignoring, the Bologna templates are hotly disputed in both regions – but the pressure to respond is growing.

Not only are the higher education sectors in these regions becoming more integrated, but we can also see a more highly-stratified global market of higher education emerging across these regional spaces. A global “Ivy League”, or “super-league” (Markwell 2006) of universities is identifiable, who already operate on an international and competitive plane, and which are holding themselves aloof from suggestions of new models or markets radically reshaping their operations, objectives and outlooks. As Graham and Diamond (1997) have noted in the US context, the top of this hierarchy can be remarkably stable. While there have always been systems of higher education with elite institutions and intense status competition (Marginson 2006, 2007), however, what is different today, and why it matters more today, is the centrality of such highly-stratified systems to the new global economy. Those institutions that wish to stand outside of the tipping logic are pro-actively mobilising their own resources and capabilities in order to generate an alternative circuit with its own ‘elite’/competitive advantage. They are rejecting the compatibility logic, defining their own global pathways, and extending their scalar reach.

Most continental European universities, however, do not feature in the top 20, 50 or even 100 universities in the global rankings which are granted such significance by political commentators. Australia also features low on this list. Furthermore, after securing over half of the top twenty places in the World University rankings, “US universities fall away drastically lower down”, accounting for only 55 of the top 200, compared with 88 for Europe (THES 2006). Thus, the ‘second-rank’ in global higher education remains a highly-contested space. Programmes like Erasmus Mundus, while promoted as a ‘flagship programme’ for the EU, in fact engage most strongly with universities in this bracket. The real fight for global dominance may in fact be taking place at this level; between the second tier of US institutions, European universities and Australian higher education institutions. It is here perhaps that we should be looking for new geometries of power, and where the threats of regionalising initiatives in other areas will be felt most strongly - “that’s the problem with trying to become competitive”, notes the Economist, in a recent analysis of the European university reforms; “before you know it, you may find yourself having to compete” (‘Charlemagne’ 2007).

## 6. Conclusion

An overriding concern of this paper has been to demonstrate the nature and consequences of this multi-scalar, multi-centric relation within and across spaces—to move our analytical focus away from bi-lateral causal explanations, or from the more recent attention on positioning and position-taking. These explanations offer useful insights, however they do not give us sufficient analytical purchase on the transformations that are taking place within and across state spaces that in turn change the logics and dynamics shaping developmental trajectories. In other words, we are looking at the ‘not-so-obvious’ as well as the more obvious outcomes of globalisation; the processes of de-nationalising within the national domain, as well as the more visible global rescaling that is taking place. We have examined how internal logics of competitiveness at the regional level are beginning to transform the global playing field. While it is early days, it is nonetheless possible to see a set of dynamics at play, where new capabilities are emerging to disrupt – and reconfigure - the balance of

power. A whole new ‘ball game’ is emerging, in which power and influence in this more integrated, stratified global system, are being radically reshaped, and not simply reallocated.

There are new elements in this mix that we have not addressed in this paper, though they are clearly important; the rise of China and the significance of its own higher education reforms, the commitment of Singapore to become a regional provider of education services, the creation of higher education ‘hubs’ in the Arab region, the Alternative Area of the Americas, the ambivalent and ambiguous position of the United Kingdom in the Bologna negotiations, and so on. Nor have we paid sufficient attention to the hedge-betting strategies of many of higher education institutions and their networks of influence, at various levels of the global hierarchy, in reaction to the limitations that a Bologna-like architecture might impose on their institutions. Further analysis of these factors would be richly rewarding. Separately and collectively, such developments -together with those that we have outlined above- are transforming global, regional and national spaces, the interrelations between them, and the role and significance of universities within them.

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