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The global positioning of Australian higher education: Where to from here?

Simon Marginson *

Professor of Higher Education
Centre for the Study of Higher Education

* Centre for the Study of Higher Education, University of Melbourne, Victoria 3010, Australia.

Email: s.marginson@unimelb.edu.au

web including downloads: http://www.cshe.unimelb.edu.au/people/staff_pages/Marginson/Marginson.html

Introduction

This paper is about the global positioning of Australian higher education: past, present and future. It draws on various policy-related research projects supported by the ARC and OECD and conducted or shared by the author: on globalization and higher education world-wide and in the Asia-Pacific; on global strategy; on cross-border student security; on the internationalisation of Australian universities.

It begins with two caveats. First, it is primarily about the 'international education industry' and about global strategy. But it is not a marketing paper. It does not adopt a marketing view of the world. Nothing is more fatal to our capacity to understand and to strategically advance our global position, than that habit of always putting the best possible gloss on what we do. It leads readily to hubris, inflation of our prospects, papering over the cracks and avoiding the difficult topics.

Second, the paper is about national position and national strategy in the global setting. This invokes the dilemma between global cosmopolitanism and what Amartya Sen calls 'national particularism'.¹ Research universities are world-wide and cosmopolitan institutions. Often the claims of country are less important than the claims of the principal fields of knowledge, which, if not quite universal, have little respect for borders. Universities, here as in many countries, are thronged by foreigners whom we welcome as our own. No one is stereotyped, no one is baited, no-one is bashed, no-one is denied the right to enter because of the colour of their skin or where they are from. On their best days universities provide for the global good, the common good, the multiple good. The deepest problems - ecology, climate, food, water, disease, poverty, military conflict and civil chaos - are often world-wide in their causes and always world-wide in solutions. What is the moral foundation for an argument that says the interests of one person, or one nation, are primary over those of another? Such an argument is banal, insular, arbitrary.

Globalization is the process of world-wide convergence and partial integration.² Economy, knowledge, culture and language are part globalized. Communications ensure that the world can no longer be kept out, even if we tried, like King Canute, to somehow stop the flow. Universities everywhere are now connected up to every other. Research is world-wide, educational trade crosses borders and we share the ideals of intellectual freedom and student security with colleagues everywhere. Globalization is uneven and unequalising between and within countries, and not everything has become suddenly 'global', for local and national dimensions continue. Despite student and staff mobility, higher education and research are locally grounded and vested in national policy and funding, all over the world. But the point is that we are now continually affected by universities in other countries, and higher education in Australia continually affects people beyond Australia. This broadens our interests. For example we must contribute to educational capacity beyond our border, especially in Southeast Asia where Australians will always live.

But, and it is a sizeable but, though the world is partly globalized, governance lags behind. We must work with the realities of politics, the art of the possible. And while there is much more to our policy options than the two party system suggests on a given day, government, policy and politics remain largely national in form.

¹ Sen, 1999.

² Marginson and van der Wende, 2007; Marginson, 2007a.

The global public space is little developed.³ The problem, brought home in a rush by climate change, is how to bring the interests of national others into the centre of our vision where the 'Australian taxpayer' has always come first. Meanwhile we continue to talk about a *national* system of higher education, *national* strategy in the global setting, in the *national* interest. And here I will follow that course. But inside this nationally particularist paper, a larger paper is striving to get out.

Global positioning

Australia is a moderately wealthy nation with a GDP per head above the OECD average, and it is migration heavy: good starting points for global engagement. In the global dimension there are broader possibilities and action is less constrained than at home. Globalization brings with it two strategic imperatives. One is to go with the flow, to recognize the realities it creates. The other is to take advantage of the opportunities it brings and to shape our position and movement wisely within the flow, knowing we will be transformed, and self-transforming, in the process.

What are the elements that can help Australia and Australians to maximise the global effectiveness of their higher education institutions? I suggest there are three elements of domestic Australian capacity, three elements of global engagement.

The first element of domestic capacity is critical mass in research, knowledge formation and training, in the main disciplines and inter-disciplinary applications. Knowledge is formed in global networks in which some nodes are stronger than others. Nations (and universities) without broad research capacity must work from behind using someone else's knowledge base. This is why emerging nations like Singapore, Korea and China have put such emphasis on building basic research.

The second element is rising educational levels among domestic students. Educated populations are more flexible, technically and culturally competent and able to learn. In most nations participation is rising, sustained by the gap between the returns to degrees and more junior qualifications, and the spill-overs from an educated population. Graduate work moves down the occupations but some jobs get smarter. Graduate unemployment has not become the problem many feared.

The third domestic element is global knowledge cities where universities are intensely engaged with government, industry innovation and arts of world significance. A global knowledge city is a mecca for visitors, ideas, creative talent and capital and is open to newcomers on the basis of merit. The global dimension is a network of global knowledge cities. This is the A game. We must be part of it.

The first element of global engagement is that higher education sustains broad-based and multiple connections across the range of teaching, research, doctoral training and business activities. A balanced multi-purpose engagement that covers the principal regions of the world and is grounded in multi-language and long term partnerships. Two way flows of staff and students across all borders.

The second element, within the broad engagement, is strategic focus on the Asia-Pacific. Geography matters. Economics matters. Demography matters. Australia is

³ Marginson, 2007b.

close to Indonesia, China and India, three of the four largest nations. More than one in ten Melburnians are Asian born. Australian education has a special role in Southeast Asia. Tectonically speaking we are becoming part of Asia. The Indo-Australian plate is moving northeast at 7.3 centimetres a year. We collide with Indonesia in 50 million years.⁴ Keating was right, just a bit ahead of his time!

The third element is an international education program that meets economic, cultural and educational objectives. One that generates revenues, sustains a cosmopolitan student body, and is consistent with the other elements of global effectiveness, including local participation. One that contributes to global cities, research capacity, balanced global relations, and strategic focus on Asia-Pacific.

How well are we doing? I will not unpack each element in detail. I'll focus mostly on the final element, international education. But first I'll discuss research capacity and domestic participation which are caught up with international education.

Comparative research capacity

First, research capacity. Australia has a broad-based research capacity, with 17 universities in the Shanghai Jiao Tong top 500, the best available measure of research output. This is almost half the public universities and taking national size into account is on par with other well distributed systems such as the UK, Canada and Germany. But we have only two in the top 100, ANU and Melbourne, both in the second 50. It is the same story in the disciplines. Australia has 15 discipline groups in the world's top 100 but only three ranked in the world's top 50. We think of Melbourne as a 'world-class' city in biomedicine but Monash is outside the top 100 and Melbourne is ranked 75-100.⁵ There is work to do here.

Very strong research universities and discipline groups are integral to global knowledge cities. Here Switzerland, Sweden, Denmark and the Netherlands are ahead of Australia. The UK is way ahead. Its GDP is three times as big as ours but it has five times as many universities in the top 100 (11) and several in the top 50. Perhaps the best comparator is Canada. Like Australia Canada is a geographically dispersed federation, broadly similar in size and in its political, cultural and educational heritage. Canada has four research universities in the top 100 and two in the top 50. The University of Toronto, a city even more internationalised than Melbourne, is at equal 23rd in the Jiao Tong; British Columbia is at 36. Toronto is third in the world on volume of citations after Harvard and Tokyo, UBC is 25th.⁶ This is where *our* best universities could be under a different policy regime.

Comparative participation by domestic students

Australia's rate of participation in tertiary education has long been above the OECD country average and the population is relatively well qualified. In 2005, 31 per cent of 25-64 year olds held a degree or diploma compared to 25 per cent in the average OECD nation. On the other hand Australia's proportion of 25-64 year olds whose highest qualification was lower secondary education or below was also

⁴ Geoscience Australia, 2007.

⁵ SJTUIHE, 2007.

⁶ SJTUIHE, 2007.

well above the OECD average.⁷ (This split between two large groups, one highly educated the other poorly educated, facilitates 'wedge' politics). But it is the size of the tertiary educated group that affects global capacity. And that story is good.

Recent trends are less favourable. Between 1995 to 2005, the enrolment of 15-19 year olds in Australia rose slightly from 81 to 82.5 per cent of the age group. The OECD country average rose from 74 to 81.5 per cent, nearly closing the gap with Australia.⁸ There was a marked rise in the enrolment rate in most countries, but in Australia little change. More seriously, direct student throughput from Year 12 at school to higher education has fallen. In Victoria in 1997, 46.6 per cent of the previous year 12s went to university the next year. Seven years later it was 35.6 per cent.⁹ It is not lack of places. Unmet demand is very low.¹⁰ Perhaps it is partly explained by gap years and a buoyant labour market; and partly compensated by Australia's relatively high participation of the over 30s. But it doesn't look good.

Growth of international education

Keeping these two under-performing areas in mind, research capacity and domestic student participation, let's turn to the international education program. Here Australia has not under-performed. One might say it has over-performed.

In 1985 30,000 international visitors arrived in Australia for education, including 400 from China. Twenty years later in 2005 there were 375,000 education visitors with 53,000 from China. The number of foreign students in the world multiplied by three but in Australia it multiplied by 12. In 2005 there were 164,000 international students onshore in higher education. More than a third could be expected to later obtain permanent residence. That's a lot of demography. (However there is little student flow in the other direction. In 2004 9400 local tertiary students studied overseas, one for every 15 students coming in.¹¹ The flows are not balanced).

A lot of demography, a lot of economy. In 2005 the industry generated \$11.3 billion in fees and other spending by students, with more than \$4 billion in fees, two thirds in higher education.¹² Australia commanded 6 per cent of the world market in foreign students. Education is our third or fourth largest export sector, after iron ore and coal and on par with tourism. In 2006 international students provided 15 per cent of university funding overall and *half the revenue* of Central Queensland. Last year Melbourne took in 16.1 per cent of income as international student fees and just 15.2 per cent as Commonwealth grants for teaching domestic students.¹³

Why this incredible growth, especially when domestic numbers have been flat for the last 10 years? International education expanded in two phases. In 1988 the old subsidised scheme was abolished and full fees became universal. (Some foreign aid scholarships continued but not on the scale of the old Colombo Plan). In phase 1 from 1988-1996 international students provided *supplementary* dollars. Domestic

⁷ OECD, 2007, p. 36.

⁸ OECD, 2007, p. 291.

⁹ Senate Hansard, 2006.

¹⁰ Karmel, 2007

¹¹ ABS, 2007.

¹² ABS, 2007; updated data from Professor Chris Nyland, Faculty of Business and Economics, Monash University.

¹³ DEST, 2007a.

numbers grew rapidly though public funding per domestic student fell. In phase 2 from 1996, international fees became an unambiguous *substitute* for public funding. There was a sharper fall in public funding per domestic student, domestic growth slowed – numbers fell in some years – and international enrolments rocketed up.

In phase 1 student demand was fostered by sector-wide marketing in Southeast Asia, coordinated by the government and facilitated by a relatively open student visa regime. At university level growth in supply was fostered by deregulation, by the new freedom to raise commercial revenues. Institutions were forbidden to subsidize international student places from their public funding but once full cost pricing was established, they could charge what they liked and expand numbers as they wished. The ‘no subsidy’ rule was to have negative effects by discouraging international research degrees, but at the time it quarantined the international market from the HECS-based domestic stream so that local student access was unaffected. This defused potential opposition. International education quickly became the main source of discretionary income, kick-starting the rise of business functions in the 1990s. When public funding per student declined amid the expansion of domestic participation engendered by the Dawkins reforms, international education began to support the core funding of institutions.

In phase 2 the supply-side incentive to grow was structured directly by cuts in public funding. Full indexation was abolished by Labor in 1995 to encourage ‘productivity savings’ and this continued from 1996 under the Coalition. Each year the gap between costs and public funding increased, driving international enrolments higher and fully entrenching dependence on this revenue source. The Vanstone cuts in public funding per student, implemented in 1997-2000, intensified this by enlarging the funding hole. Institutions now lost money on HECS-based domestic places even when charging the maximum possible HECS unless they ran down quality, and the gap increased each year. This is why many universities are silent on domestic participation and student financing issues but lobby energetically for fee deregulation which enables them to generate net revenues.

The 2005 Nelson package restored some of the Vanstone cuts but partial indexation was maintained and along with it the structure of incentives. Universities still have to increase the number of fee-paying students each year or alternately, tighten their belts. The three part legacy of the Howard years is the astonishing scale of export growth, the levelling or decline (depending on the indicator) of domestic participation, and the shift of costs from public to private. In the last Australia has led the OECD. While many nations have increased the role of private funding, most have also increased public funding.¹⁴ Between 1995 and 2004 public funding of tertiary education in Australia fell by 4 per cent in real terms.¹⁵ Public funding per student fell by 27 per cent.¹⁶ Australia invested 0.8 per cent of GDP in public tertiary funding in 2004, 25th of 29 OECD countries.¹⁷

The resource dependency regime

¹⁴ OECD, 2007, p. 217.

¹⁵ OECD, 2007, p. 221.

¹⁶ Marginson, 2007d.

¹⁷ OECD, 2007, p. 208.

Almost one in five onshore students are now international, the highest level in the OECD; and 13 Australian universities have over 8000 international students:¹⁸ Melbourne, Monash, RMIT, Macquarie, New South, Sydney, UTS, Wollongong, Central Queensland, Southern Queensland, Griffith, Curtin and South Australia. To put this in perspective, the University of Southern California has the largest international enrolment at an American doctoral university with under 7000.

Well, a cash cow is all very well, it's a fine thing when it's peacefully chomping away there in the field. But what happens if it grows horns, turns nasty and you have to feed it more and more of your capacity, facilities, strategy, and identity? The changes in source of income have generated changes in spending that are less obvious. There has been a part shift in the balance of activity in institutions, from academic to business-related functions, services and infrastructure. Though total funding per student has remained more or less constant, as the OECD data shows, academic staffing ratios have deteriorated sharply, even in business schools, the largest earners of market income. A recent study of the budgetary effects of internationalisation in three institutions showed that little fee revenue is used to build research capacity.¹⁹ Private income can substitute for public income in dollar terms but does not fund the same level of academic capacity. This has created downward pressures on basic research and on the quality of teaching.

In part it is because international education has generated a major increase in marketing and recruitment, new arrivals services; and welfare, housing and language support. A paper by Alan Olsen at last week's AIEC conference showed that universities spent \$219 million on marketing and recruitment last year, 10 per cent of revenues, including \$66 million in fees for agents.²⁰ In part it is because investing in academic costs (especially long term positions that sustain research activity at scale) is more risky on a soft-money income. In part it is because capital investments such as buildings look better on the balance sheet. In part it is because Australia competes globally on business models, scale economies and price, not product or quality differentiation, for example innovations such as cross-cultural teaching and curricula. The main strength of the export industry lies in high volume production of standardized medium quality first degree and Masters programs in business and computing. The model works because of its flexibility as to quantity. Enrolments can be pumped up to absorb demand and meet targets by adding another layer of staff in marketing, services and casual teaching.

Institutions are shaped by resource dependency regimes. It is costly to pursue an independent strategy against the logic of the incentives. Not just CQU has put mass international education ahead of all other goals. Nearly all institutions feel compelled to build volume in the global student market. Even Go8 institutions are elite educators at home but mass educators abroad so that their last selected international students are academically weaker than their last selected local students, compounding problems of academic English. There are two exceptions. One is ANU, which has block funding for basic research, so a different incentive structure. The core mission incorporates research and an Asia-Pacific orientation and a full range of cross-border activity is pursued. The other is Melbourne, which against the times has opted for a global strategy based on mission differentiation,

¹⁸ DEST, 2007b.

¹⁹ Marginson and Eijkman, 2007.

²⁰ Rout, 2007.

curriculum reform and structures that facilitate mobility. The University has halted growth in student numbers, not easy because it redoubles the pressure on costs.

Why has government driven this policy in Australia? The global positioning moves of universities are themselves positioned within a larger national strategy. This has two macroeconomic objectives: to maximise export revenue, and to minimize public spending. These objectives, fundamentally domestic in a narrow sense, take primacy over the health of the universities. Note the symbiosis between fiscal policy and export policy. Fiscal reductions drive the frenetic growth in international students. Revenues from international students replace public funding, legitimate fiscal policy and protect the budget bottom line. The policy goals reproduce each other.²¹ But the price is a narrowing of tertiary policy, even indifference to it. And it undermines global capacity more broadly defined, resting on vibrant institutions in global knowledge cities with a strong research presence and the power to attract creative people. But currently higher education is not seen as a source of national capacity in that sense. It is seen primarily as a trader and a cost, and as a source of second level skilled migrants. As long as the export dollars keep flowing policy is oblivious to basic research, teaching ratios and the balance of global operations.

Outcomes

What have been the outcomes of this resource dependency regime? The business model has chalked up extraordinary achievements. Australia has been more effective than other English speaking countries in recruiting from Southeast Asia and China (though overshadowed by the USA in Korea and Japan); and despite some hiccups, as effective as the UK in transnational operations offshore, which were highly profitable until the Australian dollar began to appreciate. Strengths of the Australian approach are openness, tolerance and a capacity for organizational improvisation (though not product innovation). Perhaps these are virtues and qualities typical of settler states. Australian marketing is also very effective.

The significance of the industry is greater than its bottom line. It has catalysed a sustained Australian university engagement with many Asia-Pacific nations and their education systems, and while in many universities this has yet to generate richer cross-border relations it has great long term implications. Likewise the presence of almost 200,000 international students in Australia each year pluralizes the Australian cultural map and is often the beginning of a lifetime association for these students; whether they migrate, return or journey elsewhere. Inexorably this is integrating Australia into the Asia-Pacific. It is partly 'Asianising' Australia. For those who believe as I do that this is only viable strategic path, the present scale of international education is highly positive for Australia's global capacity.

The impact on institutions is uneven. International education is carried above all by thousands of general staff. My impression is that in the last 15 years, marketing, student servicing and less clearly, language support, have all advanced. Services have become more culturally aware (in the absence of language skills it is difficult to achieve a fuller cultural sensitivity). The atmosphere on campuses is normally supportive of international education with little overt discrimination and targeting.

²¹ Marginson, 2007c.

The record in the classroom is more mixed. There are brilliant and dedicated teachers who 'go the extra mile' and there are others for whom it is a point of principle to treat all international students as native speaking locals. We have made little progress on the long-standing problem of under-mixing of local and international students. Despite its scale international education contributes little to broadening domestic education. Despite the rhetoric about international education as a 'cultural exchange' we have not generalised cross-cultural approaches to learning that would give real dignity to the prior learning of international students.²² But pedagogical innovations are cost heavy until they can be developed at scale. They need small student groups and time for staff development. They are public goods in the economic sense and must be subsidised. Here the problem is that the business model does not fund externalities; and while it sustains the reflexive logic of continuous improvement, the objectives are market share, managing costs and customer satisfaction, not academic excellence, student learning or education innovation. When it doubt we take the low cost route. Thus Australian universities use IELTS tests as a selector because this is meant to guarantee preparation in academic English, though we all know it does not. Continuing language problems are tackled with deficit models long been out of favour in domestic education.

Australian institutions find it difficult to synergise their organization and business strengths with their academic capacity. The most natural zone for such a synergy, international doctoral education, is undeveloped. This is a scholarship-based market not a fee-based market. But in Australia the few scholarships on offer go mostly to domestic students. We have few first class international students, who find better opportunities elsewhere, perhaps fewer than under the Colombo Plan, weakening Australia in the global competition for advanced skills.²³

Another area of concern is international student security. The 2006 International Student Survey, released last week, reported the second most important issue influencing the decision to study in Australia is that it is perceived to be a 'safe and secure, or a safe place to live'.²⁴ Under the ESOS Act the student is positioned as a consumer and the provider institution is positioned as responsible for educational and pastoral matters within a consumption paradigm.²⁵ Little is said about welfare. In interview, front-line providers of pastoral services state that the quality of the services they provide should be improved but are not because it is not funded. The National Code of Practice is strong when enforcing immigration regulations, weak as regards welfare – in areas like housing, health cover and language assistance rights are not guaranteed – and does little for students off campus where most of their security problems are found. The ESOS Act does nothing for international students exploited in the workplace or subject to housing discrimination or racist targeting in the community, outside the consumer/ provider jurisdiction. Government itself contributes little directly to security except by providing police, and the federal department of immigration can be a nightmare.

²² Sawir, 2007.

²³ A study by Birrell et al. (2006) found that between 2002 and 2004 there were only 83 applications for permanent residence by international doctoral graduates. In contrast the United States provides over 60,000 foreign doctoral scholarships a year. Approximately half of all these foreign doctoral graduates opt to stay on in the United States, swelling the American knowledge economy. For more discussion see Marginson and van der Wende, 2007.

²⁴ AEI, 2007.

²⁵ National Code, 2007.

Difficult questions about security are not being asked. For example the 170,000 international students were left out of the AVCC survey on student finances.²⁶

At the bottom end things are more serious. Institutions take marginal students and collaborate in migration-driven enrolment in which the program is irrelevant and scholarship is evacuated. This corrodes the intrinsic purpose and core values that distinguish universities from other organizations, undermining us all. These institutions, but not only these institutions, are also associated with recurring problems of standards in teaching and assessment. It would do little good to assemble these problems in detail here tonight, in the absence of policies, incentive frameworks and institutional mechanisms capable of solving them. The point we need to recognise, however, is that quality assurance mechanisms alone cannot 'solve' such behaviours. They are intrinsic to the current policy settings.

Conclusion

Summing up, Australian higher education does better on some indicators of global capacity than others. Basic research and domestic participation are being neglected. We have very strong exports and an Asia-Pacific orientation but the basis is narrow. For example Australian universities see China principally as a site for selling places, not as an emerging R&D power second in volume to the USA. International enrolments are concentrated in business and at first degree and Masters level. Research cooperation and student exchange are underplayed. And policy is zero-sum. It has fashioned the institutions for export at the expense of mission diversity, research and domestic participation. This weakens the capacity of universities in Melbourne, Sydney and perhaps Brisbane and Perth to contribute to global knowledge city synergies – though there is no doubt that the population of city centres by international students is helping us to the global city.

The Dawkins legacy always was a mixed blessing. It was an illusion to imagine that commercial international education could be developed at scale without protecting domestic participation, teaching quality and the research mission. The two dimensions, international and domestic shape each other as tends to happen in globalizing environments. Thus the strengths of international education are the obverse of its weaknesses. The more the business of international education builds this vast industry, the more we become aware of the many-sided potentials it has neglected and the humanism and intellectual depth it empties out. These weaknesses are not simple the price of export success. We are aware of them only *because* of that success. By comparison the system of the mid 1980s, prior to the market, was insular and mundane. We would not want to turn back the clock.

But it could have been better done. It *is* possible to have strong exports, improve research capacity and build domestic participation as well. The UK has done it. Post-election policy should take stock, place the export program in the larger setting, identify the downsides, change the incentives and take corrective action.

Like other export industries, international education would benefit from a judicious program of subsidies to sustain quality and foster diversity and selective innovations. The more urgent problem is to change the framework of incentives so

²⁶ AVCC/UA, 2007.

as to re-strengthen domestic teaching and research. If full indexation is restored, universities would no longer enrol more fee paying students each year just to stay afloat. If domestic places were funded at cost, it would no longer be necessary to subsidise core functions from the international program. If selected research universities were funded for the research mission at scale, like ANU, they would no longer rely on mass international education for developmental income. More generally, a policy framework of nuanced missions would allow some institutions to pursue high volume exports without imposing this on all institutions.

Funds could be targeted to particular aspects of global capacity: international doctoral scholarships as suggested by the Go8, post-doctoral awards, support for students going abroad sufficient to secure a sea-change in behaviours, Asian languages at university, Asian language teaching in schools. Within the international education program itself, the most valuable move would be to subsidise intensive programs in foundation English for those who need it. In the short term this would be expensive. In the longer term it would pay dividends. It would tackle the standards issue head-on, meet student needs, and secure for Australian providers a new advantage in the global market; one based not just on price and economies of scale but on product and quality differentiation. Instead of confining academic excellence to the marketing pitch on the international education website, we would finally install it at the centre of the program.

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