University Reform, Globalisation and Europeanisation (URGE)

Project Management

Contents

1. URGE Concept Note

<u>Overall Aim</u>

This four-year programme of research exchanges, funded by the European Commission under the Marie Curie programme and by New Zealand's Ministry of Research, Science and Technology (MoRST), aims to develop a new research community working on how processes of regionalization and globalization are redefining the nature and scope of universities. A comparison between the regions of Europe and Australasia, especially New Zealand, will ask, what is actually going on in apparently similar processes of university reform? Are processes of creating a European Higher Education Area not only preparing Europe for global competition but also acting as a model and motor for globalization in other regions? The programme will develop theoretical and methodological approaches for ethnographic studies of these processes and their effect on teaching and research practices. Its purpose is also to provide an evidence base on the different national approaches to university reform and the global knowledge economy, and to develop extended case studies that examine the implications of these processes for the social mission of the university.

The exchanges are between three research groups:

- EPOKE (Education, Policy and Organization in the Knowledge Economy) at the Danish School of Education, Aarhus University
- GES (Centre for Globalization, Education and Society), Graduate School of Education, University of Bristol
- EI (European Institute), Auckland University

An important aim of the programme is to create enduring partnerships and future collaborative research projects between the three research groups. To this end, the three universities' research or international officers are also involved in the exchanges

<u>Work Packages</u>

The programme consists of 6 Work Packages. WP 1-2 ('methodologies') will develop a new conceptual and theoretical framework to analyse the globalization of higher education. WP 3-4 ('policies') will compare how 'coordination' of HE operates across different regional spaces and how universities are being reshaped as knowledge organizations. WP 5-6 ('impact') will develop extended case studies to examine how these processes affect research and teaching practices and the mission of the university. Each work package involves a schedule of exchanges combining senior and junior researchers in research training, sharing knowledge and research development

Each work package has a designated co-ordinator and lasts about 18 months. The co-ordinator starts by drawing up a detailed work plan. S/he asks all the participants, who would like to be involved, and what they wish to contribute. Participants scheduled to make an exchange visit as part of a work package will do the core of the work, but those hosting visits and anyone else can also participate. Contributions can range from, for example, exchanging existing knowledge, to collaborating between different perspectives to create new insights, introducing each other to new literatures, or doing new research in the host country.

Every work package will hold a workshop, in which as many members of the programme as possible will participate, either directly or electronically. Each work package will publish its results in a working paper series on URGE's website and in articles in identified journals. The whole programme will conclude with an edited volume covering the scientific achievements.

<u>Management</u>

The day-to-day management is done by Sue Wright (Programme Co-ordinator) and Svetlana Wolkov (Administrator) at DPU.

Programme co-ordination is done through two-monthly Skype meetings between Sue Wright, Susan Robertson (Bristol) and Cris Shore (Auckland).

An annual meeting, during one of the workshops, will involve all participants in reviewing the individual work packages, their accumulative impact, and progress towards long-term collaboration between the three research groups.

<u>List of Participants</u>

Danish School of Education, Århus University

Professor Sue Wright, Associate Professor Kirsten Marie Bovbjerg, European Development Officer Ole Henckel, Associate Professor Jens Erik Kristensen, Associate Professor Stavros Moutsios, Ph.D. Student Gritt B. Nielsen, Professor Dorte Marie Søndergaard, Director for Internationalization Arne Carlsen.

University of Bristol

Professor Susan Robertson, Senior Administrator Dan Cook, Professor Roger Dale, Post-Doctoral Fellow Peter Jones, Research Associate Fumi Kitigawa, Senior Lecturer Lisa Lucas, Ph.D. Student Susana Melo de Melo

University of Auckland

Professor Cris Shore, Associate Professor Chris Tremewan, Associate Professor Elizabeth Rata, Associate Professor Dr. Airini, Dr. Lynette Read, Dr. Melissa Spencer

<u>Contac</u>ts

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Susan Robertson   S.L.Robertson@bristol.ac.uk

Cris Shore   c.shore@auckland.ac.nz

<u>Additional documents available on request</u>

1. Project submission   2. Charts of exchanges and work packages

2. URGE: Authorship Protocol

There are two main reasons why it is important for participants to the URGE project to agree an authorship protocol;

1. The URGE project involves creating new knowledge out of the 'transfer' and exchange of research results, ideas and insights that we have accrued from our current or previous research. Some of these 'results' may already have been published, in which case attribution is straightforward, but others may be ideas people are still mulling. To be able to engage confidently in discussion and the exchange of ideas in workshops and in informal settings, we need to be sure that, if a participant uses or builds on another's ideas, they will be properly acknowledged.

2. Participants in the URGE project span from professors to early researchers who are trying to establish their careers. Where there are such differences in formal status, it is sometimes daunting to open a discussion with a senior academic about publishing conventions. To establish an intellectual environment conducive to open discussion, it is important that we establish methods for participants to raise issues of attribution and authorship.

Using other people's ideas and expressions is part of the fabric of academic research, and equally, it is generally accepted that failure to acknowledge your intellectual debt to others is dishonest. In a knowledge exchange project, whose success depends largely on the quality of conversations over four years, situations might arise which are not so 'cut and dried', and someone could be using another participant's idea without realising.

Confidentiality

If a participant wishes to contribute to a discussion by using some material that is sensitive or confidential, then he or she should clearly state that the material is confidential, and all participants must respect that and not refer to the material outside of the meeting.

Authorship

In general, the convention will be:

- If several people have contributed equally to a publication, then their names will be listed in alphabetical order.
- If one person has played a more substantial role than the co-authors, then the major contributor will be named first, and the rest in alphabetical order.
- If one person has coordinated the whole publication and edited the other contributions, that person should be 'editor', and the others 'contributors'.

Attribution

In general, the convention will be:

- A footnote on the first page or an 'Acknowledgement' section at the end, saying that the author's involvement in URGE has contributed to this publication, and mentioning any people within URGE who have made any special contribution (e.g. an important influence on particular ideas or useful comments on a draft).
- If an author uses an idea that came out of a presentation or a discussion (however informal) with another URGE participant e.g. at a workshop or in an email exchange, then a footnote at that point in the paper should acknowledge that contribution.

Discussion of publication and authorship

The detailed outline for each work package should include plans for publication. This will include URGE working paper(s) and may include other articles, journal special issues, edited volumes or website contributions. Questions of authorship and attribution must be discussed when formulating the detailed outline, and every time ideas about publication evolve subsequently. That is, discussions of publication should not just be 'what' but also 'who' in terms of authorship and attribution.

Failsafe

Each working paper or other publication arising from the project should be circulated to all participants in draft, with an invitation to comment within two weeks. Often these comments will be of the usual kind, helping academic peers to sharpen their argument, but this two week period is also an opportunity for anyone to point out that some material or an argument used in the text came from a contribution or comment made at a workshop or other interchange. While the individual concerned is welcome to raise such a query on their own behalf, others may also do so, as it is a collective responsibility to notice and discuss such issues. If the author agrees that this was a source of the information or argument, it is expected that they will make an attribution. If an issue is not easily resolved, it can be referred to the management team (SW, SLR, CS) or such of them as are not directly involved in the case.

Authorship OR Attribution?

The borderline between authorship and attribution is a perilous grey area, which hopefully we won't encounter. But if a participant feels their written contribution to a text has been so great that they should have the status of author, then the management team (SW, SLR, CS) or such of them as are not directly involved in the case, will investigate and advise the people concerned.

SW

Dec 2010

AARHUS UNIVERSITY   Research   Talent development   Knowledge exchange   Education   About AU   ⌄ Shortcuts

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UNIVERSITY REFORM, GLOBALIZATION AND EUROPEANIZATION (URGE)

About URGE

URGE (University Reform, Globalisation and Regionalisation) is a multidisciplinary programme of knowledge exchange, examining how processes of regionalization and globalization are redefining the nature and scope of universities.

The partners are

› Danish School of Education, Aarhus University, Denmark (Project Coordinator Professor Sue Wright)
› Graduate School of Education, University of Bristol, UK (Coordinator Professor Susan Robertson)
› European Institute, Auckland University (Coodinator Professor Cris Shore).

A comparison between the regions of Europe and Australasia, especially New Zealand, will ask what is *actually* going on in apparently similar processes of university reform? Are processes of creating a European Higher Education Area not only preparing Europe for global competition but also acting as a model and motor for globalisation in other regions? How do academics engage with such processes of university reform? How are these processes affecting their conduct, their work, and their ideas of the very purpose of universities?

Starting in January 2010 and lasting for four years, URGE involves 19 staff from the three universities in a programme of visits designed to combine senior and junior researchers in research training, sharing knowledge and research development.

URGE is funded by the European Union's Framework 7 Marie Curie 'International Research Staff Exchange Scheme' and Erasmus mobility scheme, and by the New Zealand Ministry of Research, Science and Technology (MORST).

What does URGE work on?

Contact at DPU

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Or directly to any of the researchers.

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4.URGE Bulletins

Bulletin to All URGE Participants
From: Susan Wright
Sent: 17. November 2010 18:20
To: e.rata@auckland.ac.nz; s.tremewan@auckland.ac.nz; c.shore@auckland.ac.nz; l.reed@auckland.ac.nz; airini@auckland.ac.nz; m.spencer@auckland.ac.nz; n.lewis@auckland.ac.nz; s.l.robertson@bristol.ac.uk; p.d.jones@soton.ac.uk; r.dale@bristol.ac.uk; fumi.kitagawa@bristol.ac.uk; edsjdm@bristol.ac.uk; Arne Carlsen; Dorte Marie Søndergaard; Gritt B. Nielsen; Jens Erik Kristensen; Kirsten Marie Bovbjerg; Ole Henckel; Stavros Moutsios; Susan Wright; d.j.cook@bristol.ac.uk
Cc: Que Anh Dang; Katja Brøgger Jensen; Dirk Michel Schertges; Grete Brorholt; Jakob Krause-Jensen; Jesper Eckhardt Larsen; Lise Wendelboe; Marianne Søgaard Sørensen

Dear Participants in the URGE project, (Plus EPOKE members for information)

I am sending this bulletin to update you on URGE activities so far and look ahead to the next few months.

1. Most importantly, on 21 October 2010, the EU signed and completed the contract for the project, a mere 14 months later than promised! Cris Shore has valiantly managed to hold on to the promised match funding from the New Zealand Ministry (MOST) during all this time, and that is now hopefully all secured. The EU asked us to start the project nevertheless on 1 Jan 2010, and this we did.

2. I attach a concept note for participants to remind you about the aims of the project and its 6 work packages.

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3. Work package 1, Coordinated by Susan Robertson, on 'Globalisation and higher education: towards a new conceptual framework'
   The plan for this work package is attached.

   So far Stavros Moutsios from DPU and Susan Robertson and Roger Dale from Univ of Bristol have visited Univ of Auckland.

   They had a very busy programme, including a 'Globalisation and HE Symposium'. The flyers and details of these events are attached.

   From 29 Nov to 3 Dec people are converging on Bristol: Cris Shore, Chris Tremewan, Melissa Spencer and Nick Lewis for Auckland; Sue Wright, Gritt Nielsen, Stavros Moutsios and Kirsten Marie Bovbjerg from DPU; and Peter Jones from Southampton.

   The Final events for work Package 1 will be held on 2 December – details to follow.

   It looks like Susan Robertson is planning several publications from this work, and the working paper on the work package is due by June 2011.

This work package seems to be going very well and acts as a prototype for the rest of the project.

4. Work package 2, Coordinated by Cris Shore, on 'Methodologies: combining ethnography and political economy'
   A plan for work package 2 is attached, including the themes, visits and 'deliverables'.

   If work package 1 focused on theoretical approaches to the globalization and regionalization of HE, this work packages explores appropriate methodologies.

5. The Auckland participants have organized a regular URGE writing group, where they read drafts of each other's papers. I attach a list of their URGE WRITING GROUP EVENTS, which gives a very good idea of what our NZ colleagues are working on.

6. A website is being established as part of a project by Kris Olds and Susan Robertson at Wisconsin-Madison. They are using open source software to cluster a number of websites concerned with globalisation and higher education. This will give the URGE website more visibility. The URGE logo has been designed at Auckland, the texts are being prepared now, and hopefully the website will be up and running in time to house the materials coming out of work package 1.

I hope you are enjoying and benefitting from your involvement in the URGE project and I hope this bulletin helps keep everyone in touch with developments. Please send me any feedback and suggestions for future bulletins. I will aim to send out a bulletin 3 times a year.

Best wishes

Sue

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http://journals.berghahnbooks.com/ltss/index.php

URGE Bulletin   September 2011

This is to update all URGE participants on progress since the WP2 workshop and Annual Assembly at Copenhagen in June 2011.

Visits in the rest of 2011
Ole Henckel (AU) spent a month in July/August in Auckland, and came back with his PhD thesis close to completion and brimming with ideas for a new Erasmus Mundus proposal on educational anthropology.

Lynette Read (Auckland) is visiting UoB and AU in September. She is going to make contact with the other research support officers and help us develop joint projects with the ideas arising from URGE activities (see below). DPU/AU's research support officer (Astrid Cermak) is preparing visits for Lynette in Copenhagen and Aarhus and is looking forward to exchanging information about their roles.

Kirsten Marie Bovbjerg (AU) veers between academic excitement and bureaucratic frustration in preparing to visit Auckland from November to March. Her whole family is accompanying her – husband Ulrik, son Asmus and daughter Dina.

Roger Dale (UoB) is visiting Auckland in November and December and will convene the WP2 workshop during that time (see below).

Airini (Auckland) has had to postpone her 2011 visit to Bristol until 2012.

Gritt Nielsen (AU) has had to postpone her visit to Auckland for a year.

Website
The Urge website is at
http://www.dpu.dk/forskning/forskningsprogrammer/epoke/forskningsprojekter/universityreformglobalizationandeuropeanizationurge/

Work Packages (WPs)
WP1 (Convenor Susan Robertson): the detailed plan, visits and workshop are completed and are on the website. The working paper is being written.

WP2 (Convenor Cris Shore): the detailed plan and most of the visits have been completed. The workshop was held 8-10 June at DPU/AU. The working paper and report to EU will follow.
In addition, a publication is planned arising from WPs1 & 2. A proposal for a special issue will be submitted to the journal *Globalisation, Education and Society.* The first article will set out the conceptualisation globalization and regionalization achieved in WP1 and the methodological problems that this poses. The paper givers at the WP2 workshop will be invited to focus their paper as a response to one or other of these methodological problems.

WP3 (Convenor Roger Dale): planning meetings at the Bristol workshop in 2010 and the DPU/AU workshop in 2011 have generated some very exciting ideas. A revised detailed plan and workshop programme will be put on the website as soon as they are available. The visits have started, others are under way. The workshop will be held **1-2 December 2011** in Auckland – we will try to make a video link to DPU/AU for at least part of the time.

WP4 (Convenor Sue Wright): A planning meeting at the DPU/AU workshop has resulted in a detailed plan (attached and on website). Visits are mainly all planned, and the workshop will be held at DPU/AU in Copenhagen, from **Wednesday 8th to Friday 10th August 2012**.

WPs 5 & 6 (Convenors Sue Wright and Cris Shore): The workshops for these WPs will be held together in Auckland in April 2013.

Annual Meeting
The Annual Meeting of URGE was held during the workshop at DPU/AU. Minutes are attached and on the website. It concluded by gathering some advice for future workshops which convenors should bear in mind.
The main focus was on the ideas for collaborative research and teaching projects arising from URGE visits and activities (see below).

Future research and teaching projects
The following progress has been made on the future projects that we identified at the URGE Annual Assembly in June
1. ITN (Initial Training Network) based on or developing from the URGE programme. This is EU funding for a PhD training programme for up to 20 PhD students and usually involves 6-8 European universities and universities from 'Other' countries. I have just received a Danish grant to cover the costs of preparing the EU ITN application – and am contacting potential partners and inviting to a planning meeting in Brussels in November. The application deadline is January 2012.
2. Erasmus Mundus – Ole Henckel has been in great discussions during his trip to Auckland, so I'm discussing with colleagues at DPU and will follow up soon.
3. Third mission and academic entrepreneurialism – this theme is coming to prominence in WP4. Susan Robertson and Fumi Kitigawa already have a project on the role of universities in the Bristol region, and have made their questionnaire available. Cris Shore and Nick Lewis have submitted a proposal to the Marsden Fund for a project comparing the Third Mission for universities in 7 countries, including New Zealand, UK and Denmark. Deivida Vandzinskaite, who has been a visiting PhD student attached to the EPOKE research programme at DPU/AU, has submitted a Marie Curie post doc application on universities' interaction with society in Nordic welfare state country (Denmark) and Baltic post-soviet country (Lithuania).
4. Academic fragmentation and alienation. Dirk Michel and Lisa Lucas are already in conversation, because their papers at the workshop for WP2 revealed similar interests. Lisa Lucas offered to share her questionnaire and Dirk Michel wishes to develop a research project on this topic, to be based on fieldwork in Denmark and in New Zealand during his URGE visit.
5. FP7 Social Sciences and Humanities. None of the headings in the draft Work Programme 2012 or the headline topics for 2013 seem suitable to our purposes.

Sue Wright. Co-ordinator of URGE

5.URGE Annual Assembly

Annual Assembly and Mid-way Review
Held on 10 June 2011 at DPU, AU (at the end of WP2 workshop)

Present:
DPU: Susan Wright, Kirsten Marie Bovbjerg, Dirk Michel, Gritt Nielsen, Stavros Moutsios, Laura Louise Sarauw, Heather Grierson, Elizabeth Holm, Astrid Cermak (research support officer)
Auckland: Cris Shore, Nick Lewis, Elizabeth Rata
Bristol: Roger Dale

Review of progress
Website. Sue Wright presented the new URGE website.

WP1 has completed the detailed plan, visits and workshop. The working paper and material for the report to the EU are in preparation.

WP2 has completed the detailed plan and most of the visits. The remaining visit is arranged. The workshop was held 8-10 June. The working paper and report to EU will follow.
In addition, a publication is planned arising from WPs1 & 2. A proposal for a special issue will be submitted to the journal *Globalisation, Education and Society.* The first article will set out the conceptualisation globalization and regionalization achieved in WP1 and the methodological problems that this poses. The paper givers at the WP2 workshop will be invited to focus their paper as a response to one or other of these methodological problems.

WP3 held a planning meeting at the Bristol workshop, and a further planning meeting during this workshop, which produced a clear and exciting plan. Roger Dale, WP3 convenor, will now revise the detailed plan and circulate it. The visits have started, others are planned, and one has yet to be arranged. The workshop is planned for November in Auckland – Roger Dale is to try and arrange dates when Kirsten Marie Bovbjerg and Gritt Nielsen from DPU and Elizabeth Rata other from Auckland can attend.

WP4 held two planning meetings during this workshop and Sue Wright will now write the detailed plan. The WP4 workshop is planned for 6-8 or 13-15 June 2012 at DPU. Nick Lewis (UoA) and Dirk Michel (DPU) have joined this WP, and Sheila Trahar (UoB) will also contribute.

WPs 5 & 6 The workshops for these WPs will be held together in Auckland in April 2013.

Projects arising from URGE knowledge exchanges
As part of the mid-term review of progress with the URGE programme, potential projects arising from URGE knowledge exchanges were identified.

Astrid Cermak, DPU's research support officer, attended in order to become informed of these potential research projects and give advice on funding sources and their criteria.

The following potential projects were identified:

1. ITN (Initial Training Network) based on or developing from the URGE programme. This is EU funding for a PhD training programme. Usually involves 6-10 universities. Potential partners were identified.

   We apply for 12-20 PhD students, to be divided between countries. We put on a 4 year training programme, hosted by the partners, which all staff, all students on the ITN, and other PhDs attend. The courses are to include substantive material on the topic, and generic training in e.g. academic entrepreneurship, IPR, publishing strategies.

   The New Zealand government has not agreed to fund its universities' participation in ITNs. However Auckland can still be involved: the programme can include a course out of Europe, in a site which exemplifies the issues under discussion; NZ staff can be funded to teach on the course; NZ students can attend the courses for free (but they have to cover fare and accommodation).

   Agree to make contacts above. Sue Wright to apply for Danish Start grant to cover costs of preparing the application. Hold a planning meeting in Brussels.

2. Erasmus Mundus (discussed with Ole Henckel, international education officer, DPU, on 9 June 2011).

   Title to be determined, but something like Universities (or knowledge organisations? In processes of globalization and regionalisation)

   A programme to be devised from existing courses in 3 universities
   a. DPU e.g. Educational Anthropology Candidate (accreditation in progress) module by Gritt Nielsen, Jakob Krause Jensen and Sue Wright on Globalisation, organizations and knowledge, or MALLL module by Stavros Moutsios on comparative education
   b. Auckland – Nick Lewis and new colleague, plus involving Cris Shore on **universities in the city region – check**
   c. Bristol – Roger Dale to check whether Bristol will participate in EM programmes. If so, possible courses are run by Lisa Lucas, Sheila Trahar, Roger dale and Susan Robertson
   Academics to continue this discussion
   Ole Henckel is making an URGE visit to Auckland in July 2011 and will meet his counterparts to go into the details of each country's regulations, technical requirements and procedures.

3. FP7 Social Sciences and Humanities. Astrid Cermak circulated the latest draft of the Work Programme 2012 and the headline topics for 2013. Two possible headings were identified for Astrid Cermak to explore the background. If they are suitable we should submit wording for 2013 in the next month. Cris Shore and Sue Wright to meet Astrid to take this process of exploration further .

4. Third mission
   Bristol – Susan Robertson and Fumi Kitigawa are currently researching the role of Bristol and UWE in their city region. They have a questionnaire for students on entrepreneurship which they invite DPU and Auckland to use. They are following this with interviews, and doing case studies of incubators etc.

Auckland – arising from conversations in WP1 workshop, Cris Shore and Nick Lewis have applied to the Marsden Fund for a project on Auckland's third mission, with a particular focus on the role of the social sciences. They are willing to circulate this application.

DPU – Deivida Vandzinskaite from Lithuania, who has sent two periods at DPU with Cirius funding, supervised by Sue Wright. She has just completed her PhD on a major teaching development across all the disciplines in 3 universities, to introduce service learning into the curriculum, with the aim of instilling entrepreneurialism and citizenship. She is revising an application to submit for a Marie Curie post doc to join DPU as a post doc. She wishes to do a comparative study of universities' third mission, with a special focus on social sciences in Denmark and Lithuania.

It was agreed that the three projects would continue as separate entities, but that the others would look at Bristol's questionnaire with a view to making comparative studies. (Explore whether Aarhus' outreach department might wish to fund this questionnaire). There would be exchange between the projects on methodlogical and conceptual issues.

5. Academic fragmentation and alienation
    Dirk Michel and Lisa Lucas are already in conversation, because their papers at this workshop revealed similar interests. Lisa Lucas offered to share her questionnaire. Susan Robertson is also sending Dirk Michel materials for discussion.

    Dirk Michel wishes to develop a research project on this topic, to be based on fieldwork in Denmark and in New Zealand during his URGE visit. He will either do research in Bristol, or refer to Lisa Lucas' existing work. He will contact Astrid Cermak regarding funding possibilities.

Comments and suggestions for improvements

'The dialogue between us is much richer and deeper now we are getting to know each other more. Lots of ideas have been generated at this workshop. It's very positive and energizing.'

'This programme of workshops is clearly developmental and a discussion is taking shape'.

'The threads from WP1 workshop have followed through into this workshop. Now we need to find the threads from this workshop that chase into the next workshops'.

'A good positive and friendly atmosphere has developed between us and more than just exchanging knowledge, we are really discussing ideas.'

The format of the workshop over 3 days works well. This workshop worked especially well because nearly all participants gave a paper. Keep to the format of 1.24 hours per paper, but make the presentation shorter and the discussion longer.

In WP1, papers were circulated in advance – try and do this again so we can read them in advance. At least, prepare a handout of the powerpoint slides for each presentation.

At the end of each powerpoint presentation include a slide with references and a slide with abbreviations – some participants are bound not to be familiar with the acronym soup.

At WP2 it was good to have a gap between the last session and dinner. And good to structure in a walk across town from the hotel to a restaurant for dinner – exercise and seeing the town.

6. Administrative Support

6.1 Research Support Officers' secondments

The programme includes visits by the Research Support and International staff from UNIVBRIS and AU to UoA, and by UoA's Faculty Research Development Manager to UNIVBRIS and AU.

In preparation for the Annual Assembly and mid way review in 2011, and in the follow-up, they have provided invaluable advice and support in helping the URGE participants clarify potential issues on which to build long term collaborations, identify sources of funding and prepare applications.

Pictured left to right Ole Henckel , European Development Officer AU, Niels Henrik Meedon, National Centre for Culture and Learning (knowledge dissemination) AU, Astrid Cermak , Research Support Officer, AU, and Lynette Read, Faculty Research Development Manager, UoA, during the latter's visit to DPU, AU, in September 2011.

6.2.Report on Visit to Bristol and Aarhus Universities Sep/Oct 2011

Lynette Read, Faculty Research Development Manager, Faculty of Arts, UoA

<u>Visit to Graduate School of Education, Bristol University UK 19-30 September</u>
During the week of 19-23 September, I visited members of the URGE (University Reform Globalisation and Europeanisation) project team at Bristol University - Dan Cook, School Manager of the Graduate School of Education, Dr Sheila Trahar, Senior Lecturer in Education, Dr Lisa Lucas, Senior Lecturer in Education, Professor Susan Robertson and Professor Roger Dale – to discuss their research and their roles in the URGE project team. We also discussed the possibility of submitting funding applications to the European Commission early in 2012 for an Erasmus Mundus joint Masters in Educational Anthropology and an Initial Training Network involving the URGE partners and other European and international partners.

The following week (26-30 September) I met with a number of people involved in research management at Bristol University's Research and Enterprise Office and in the Faculties – Dr Lorna Colquhoun, the Head of the Research Development team, Dr Jude Hill, Research Development Manager for Social Sciences and Law, Tom Bowker, Research Development Manager for EU and Overseas, Dr Simon Gray, Research Development Manager for the Faculty of Engineering, Dominic Freda, Faculty Manager for Social Sciences and Law, Dr Susan Jim, Research Development Manager for the Institute of Advanced Studies and World Universities Network Manager, Valerie Aspin, Research Development Manager for the Faculty of Arts and Dr Anne Cook, Research Development Manager, Neuroscience. We discussed how our roles compared and also the international funding opportunities suitable for the URGE project. It was suggested that the URGE project team (led by Prof Cris Shore) apply for WUN funding in 2012 and that the project team investigate the possibilities of applying for research funding from the Leverhulme Trust and for a Marie Curie Fellowship in 2012/2013.

I also spoke with Professor Sally Barnes, the Graduate Dean, Social Sciences, regarding the possibility of Bristol University being involved in an Erasmus Mundus joint Masters programme and she agreed in principle.

On 28 September I took part in the Graduate School of Education's half-day Research Strategy meeting and on 29 September, I gave a presentation at the Graduate School of Education on Thematic Research Initiatives at the University of Auckland. I had further one-on-one meetings with Professor Jane Speedy and Dr Sasha Matthewman, Lecturer in Education, who were interested in the Thematic Research Initiatives and in the research being conducted at the University of Auckland.

Visit to DPU, Aarhus University, Copenhagen, Denmark 4-19 October

During the week of 4-7 October, I met with the members of the URGE team at the Department of Education at Aarhus University based in Copenhagen - Professor Sue Wright, Dr Kirsten Marie Bovbjerg, lecturer in Education, Dr Gritt Nielsen, lecturer in Education and Ole Henckel, Manager at the International Office – to discuss their roles in the URGE project team and their individual research projects. Two of the members of the team were intending to come to NZ shortly as part of the URGE exchange programme and I was able to give advice on budgeting for a stay of several months and general information about the practical aspects of living in NZ. I also met with Asrid Cermac, Research Officer at the Research Support Unit and Niels Henrik Meedom, Head of the Research Management Service at DPU.

In the following week of 10-14 October, meetings were set up with members of the URGE team and Research Managers at DPU to discuss the development of an Initial Training (PhD) Network funding application in January 2012 and an Erasmus Mundus application in April 2012. Accompanied by Niels Henrik Meedom, I also went to the main campus of Aarhus University at Aarhus and met with Senior Managers there – Anne Marie Pahuus (Vice-Dean for Research), Johnny Laursen (Head of Graduate School), Steen Weisner, (Head of Talent Development), Rene Dybdal Petersen (Advisor for Knowledge Dissemination, Faculty of Arts) – to secure their support for the development of an ITN application. A further meeting with Marianne Ping Huang (Vice-Dean for Education, Faculty of Arts) and Lene Hjøllund, (Advisor for Education, Faculty of Arts) was arranged to discuss the development of the Erasmus Mundus application. The outcome of both meetings was an agreement, in principle, to the development of both applications, and a request for further information from Sue Wright, giving further detail about the proposed ITN and Erasmus Mundus programmes.

While I was at Aarhus University I met with Adrienne Heijnen, (Research officer, Research Support Unit) and John Westensee, (Head of Research Support Unit) to compare our roles as Research Development Managers and discuss the role of the Research Support Unit at Aarhus University.

In the week of 17-19 October, I had further meetings with Sue Wright and also met two other members of the URGE team – Dr Dirk Michel-Schertges, lecturer in Education and Martin Bech, a PhD student of Sue Wright's. I also met again with Ole Henckel to discuss our proposed presentation at the INORMS (International Network of Research Management Societies) conference in May 2012 (joint abstract submitted in August 2011). The presentation has since been accepted for the conference and I have subsequently been successful in my application to the General Staff Professional Development Awards at the University of Auckland to receive funding to attend the conference.

Outcomes of the visit
- Agreement reached between the three Universities to submit an ITN funding proposal in January 2012 and to submit an application for an Erasmus Mundus joint Masters programme in Educational Anthropology in April 2012.
- Progress made on the development of the ITN and Erasmus Mundus joint Masters proposals.

- Further sources of research funding for the URGE project identified.
- Acceptance of joint presentation to the INORMS conference in May 2012.
- I gained a better understanding of the international research funding environment and of the role of the Research Development Manager internationally.

7. Coordination Team Agendas and Meeting Notes

First Skype conference of Project Co-ordination Team

(Sue Wright, Cris Shore, Susan Robertson)

21 January 2010, 9.30-11-30 (Danish time)

(Agenda items are in bold, Notes and Action Points are not-bold)

1. **Contractual documents**
- **EU contract- expected end of January**
- **Annex 1 dated 4 Dec 09- this is the official contractual document. It is in EU speak so everyone's name and role has been taken out. This gives us more freedom if we ever need to replace anyone but is useless for management purposes.**
- **Consortium Agreement and Partnership Agreement- will be sent to you soon**
- **AU MoU- all complete- do we have to do anything with it?**
- **Erasmus agreement with Bristol- all complete- we have to decide by February the visits from autumn 2010 to summer 2011.**

Erasmus agreement

SR has been given 2 mobility places for this year and aims for more from the British Council next year.

For 2010 we decided that SR and RD should visit DPU in Sept.2010 to report on their visit to N.Z. and progress on the work packages so far. SR will tell SW which week. SW is to organise accommodation and 5 hours teaching for them - explore the possibility of a PhD course on globalisation and regionalisation and methodologies for researching this topic. There will also be a seminar and other possibilities are 1:1 meetings with PhD students on their research, or contributions to ongoing courses.

SR informed that all that is needed for the Erasmus administration is a letter to say the person did 5 hours of teaching.

DPU participants will visit Bristol in first or second week of December 2010. SR to decide date and arrange teaching. SW to find out how many from DPU can come.

2. **Management documents**
- **Annex 1 dated 12 Nov 09- contains the details needed to manage the project. So let's agree to work from this document.**
- **Work Packages Chart- sets out for each work package:**

- o **Start date**
- o **Detailed plan date- usually before the first visit**
- o **Workshop date- always during a visit**
- o **Working paper(s) and end date.**

URGE concept note

Agreed that SW should write a concept note (by end of first week in February) setting out the essence of the project, which we will use to inform all participants.

Auckland Reading Group

CS convenes regular meetings of a group of people interested in the project, including more than those directly involved as visitors and hosts (eg Nick Lewis). Meetings are to update on the project, plan for looking after visitors, and for one person to present their recent writing on a relevant topic. CS agreed to send a list of the topics discussed so as to inform Bristol and DPU groups.

Bristol events

The Bristol Group is involved in events at their globalisation centre, and the Lakes Centre on HE at the Institute of Education, London.

3. **Work Packages 1 and 2**
   WP 1 Jan 2010-June 2011   co-ordinator Susan Robertson

   WP 2 March 2010- Oct 2011   co-ordinator Cris Shore

- **Who wants to be involved?- mail round and ask**
  - o **visitors**
  - o **hosts**
  - o **others**
- **What does each person (alone or collaboratively) want to do/contribute- with reference to the WP description (review of literature, research activity, output?)**
- **Date of workshop**
- **Date of Erasmus exchanges**
- **Working papers- those on a research visit definitely write a working paper but does anyone else? Alone or collaboratively?**
- **Any other publications**
- **Turn the above into a detailed plan of who, what, where, when, (why)**
- **Final report- who, what, when, what the WP achieved, how it contributes to the overall programme?**

Template for detailed Work Packages

SR agreed to develop the above into a template for the detailed plan of the work packages. Agreed that it should be 3 to 4 pages and aimed to communicate to participants and to the evaluators.

Template to include that each WP must produce a 5 page synthesis report for the website and for evaluators.

Publications

When planning the work packages we agreed to target the results to particular publications. The journal *Globalisation, Society, Education* which SR edits would be a good outlet for WPs 1 and 2. It would be especially interested in 10 to 12 pieces for an extended issue on methodologies for studying globalisation.

The journal *LATISS* would be suitable for the results of later WPs as it focuses on links between globalisation, institutional context and academic practice.

The *Journal of Common Market Studies* (a flagship journal on Europe) is now edited by Jim Roller and Michelle Cini (Bristol). That journal would be suitable for our work on Europeanisation and the Bologna Process.

Details of visits

It is important for the WP co-ordinator to check the dates of visits and arrange accommodation.

Peter Jones: has a lectureship at Southampton. He would still like to visit NZ on WP2. SR is trying to keep him attached to the Bristol team. This is the best solution but if this fails SW said the Partnership Agreement offers the possibility of including Southampton as a partner. (Possible replacement for Peter if necessary: Tony Berger, Amsterdam).

Roger Dale: on WP1 will visit NZ from late April to mid May 2010.

SR: will visit NZ in May 2010.

The Auckland participants have planned an informal workshop on 20 April but this would be better moved to May when SR, RD, PJ and Stavros Moutsios will all be there.

CS: will visit Bristol on WP1 from c. 18 November to mid December.

Workshop dates

Workshops are planned to coincide with visitors from NZ. Erasmus funding will be used to assemble as many European participants together as possible.

WP1 workshop will be in Bristol in week 1 or 2 in December 2010. SW to check any teaching commitments at DPU. SR then to decide which week and mail SW and CS. SW will then organise Erasmus funding.

WP2 workshop will be at DPU in June 2011 to coincide with CS' visit. Elisabeth Rata will be in Bristol - CS to ask her to include a hop to Denmark within her air ticket.

Workshop content

WP2 workshop will discuss the results of both WP1 and WP2 and their publication.

4. **Infrastructure**
- **Mailing lists**
    - **3 convenors**
    - **Participants from each university**
    - **All together**
- **Website**
- **Working paper series**
- **Space for private communication between participants**
- **Blog**
    - **To discuss WPs**
    - **Link to cognate research**
    - **Disseminate results**
    - **Exchange reading lists**
- **Virtual conferencing- skype/AGN technology?**

Emails

SR and CS agreed to send SW the email addresses of their participants.

Blog

Agreed not to set up our own blog because it takes huge maintenance.

SR suggested putting on our website a link to the blog *Global HE* which is managed by SR and Kris Olds (Wisconsin-Madison). Much of the material on that blog is relevant to our project and our participants can also contribute to that blog.

Website

SR informed us that Wisconsin-Madison is designing a website space using open source technologies on globalisation and HE. The blog managed by SR and Kris Olds is going to be on that website space.

Agreed that SR should explore the possibility of URGE becoming a project area on the Wisconsin-Madison website and find out what texts we need to produce for the content.

This would offer us a website for public dissemination (we produce the content); space for the working papers literature lists, teaching materials etc; an intranet for internal communication amongst participants; and a teleconference platform using Adobe Connect. This means that the workshops can be teleconferenced to people who cannot attend and a recording or podcast can then be put on the website.

Logo

CS offered to ask his department's designer to design a logo to give us a corporate identity.

5. **Management**
- **Day to day management**
  SW + DPU's research office (Niels Henrik and Astrid) + Institutes research support (Svetlana)

  o **Financial management- NB everyone has to keep their boarding passes- EU will not refund otherwise.**
  o **Reporting to the Commission**
- **Project Co-ordination Team- to manage the project (Partnership Agreement)**
  SW, CS, SR

  o **Bi-monthly phone conference**
  o **Annual meeting- review progress- lessons and improvements**
     - synergies between teams

     - overview results of each WP + cumulatively

     - plan next stages in detail

  o **Midway review- how well did WPs 1&2 provide a theoretical and methodological basis for the rest of the WPs?**
              - synergies between partners?

              - opportunities for further collaboration

              - results of research officers' visits- future methods of working and funding?

  o **Final review -   publish results in an edited volume**
        - design proposals for future collaborative research

        - report to EU

- Co-ordination of each work package- allocated in Annex 1- process set out above

- Annual assembly- during a workshop- project co-ordination team presents its annual review.

Project Co-ordination Team

Agreed to meet virtually again in one month and 2 monthly thereafter. SW to fix date.

Agreed to hold one of these 2 monthly virtual meetings after the annual assembly to go over what happened and pick up any outstanding issues.

6. Reporting to EU
-I've asked our research support to obtain the forms for financial and academic reporting, and their frequency.

SR advised that the EU will want reports on the scientific added value of the project and on project management.

The evaluators will also want a 5 page synthesis report on each WP.

SW has asked DPU's research support to obtain the forms for scientific and financial reporting, and find out how frequently we have to report.

7. Financial Management

SW has been informed that the EU uses 5% of our grant for insurance. Therefore the grant is not 1800 euros but 1710 euros per month.

In order for DPU to arrange payments to Bristol, Svetlana should contact SR, who will forward the correspondence to Jean Pritlove and Valerie ? in Bristol's research office.

SW 21 Jan 2010

Second Skype conference of Project Co-ordination Team

(Sue Wright, Cris Shore, Susan Robertson)

24February 2010, 8.30-10.30pm (Danish time)

1. **Contractual documents**
- **EU contract- not arrived yet.**

SW explained that the EU contract will be backdated to 1 January 2010 and we have permission from DPU to proceed.

- **Consortium Agreement and Partnership Agreement- to go through in detail and agree at this meeting**

SW explained that we should have these agreements in place before the EU contract is signed.

CS and SR promised to push their officials to send any comments to Niels Henrik Meedom promptly.

SW explained that the EU does not have a model contract for IRSES projects. Therefore the model contract for consortium projects including industrial partners has to be used, which sometimes seems inappropriate.

Publication (8.3.1): CS asked who are the 'parties' in these clauses? If the party is the university, does this clause mean the university could object to one of its academics publishing eg about internationalisation of higher education if it felt its commercial interests were jeopardised? This would infringe academic freedom. SW thought, if the parties were CS, SR and SW, this clause would enable us to ensure that all of our teams could check that knowledge they had contributed was being acknowledged. SW will check this with Niels Henrik Meedom.

Intellectual property: we discussed the meaning of Background Knowledge and how to fill in attachment 1.

We agreed that Background Knowledge includes:

- existing publications and papers relevant to a work package
- knowledge from other research projects (eg ESRC funded)
- 'head knowledge' from years of previous fieldwork
- ideas from previous research shared informally with other programme members (eg in workshop discussions, email exchanges, conversations, and personal communication)

Foreground knowledge means:

- the outputs from the URGE WPs (eg working papers, articles and books)
- conceptual and theoretical ideas and models
- identification of areas for future research- hopefully to be turned into future collaborative projects

SW agreed to write a protocol on knowledge production. The aims of this protocol are first to explain that the aim of URGE is to create an intellectual community with relations of trust. Second, the protocol will explain how we interpret the clauses in the CA and PA to achieve such

a community. In particular, the definition of knowledge should be wide enough to be inclusive of younger team members' inputs, even if they have not yet written much. The protocols should give them room to protect their informal knowledge.

SR will send SW examples of such protocols.

Knowledge and intellectual property: SW drew attention to the strange concepts of knowledge in the CA and PA. SR explained that the RAE/REF depends upon academics and individual universities being able to distinguish their intellectual property when it is produced in collaborative projects across several sites. We decided to collaborate on a comparison of the ideas of knowledge in our 3 research assessment regimes. (Note: we did not decide when and how).

Accession of a new party: SW explained that the PA provides the possibility of a party from a different university joining URGE. SR suggested we could use this provision to invite Jill Blackmore to participate in some of the work packages. (Note: we did not reach a firm decision on this.)

CS asked about involving Nick Lewis from Auckland University. SR also suggested replacing Peter Jones (who has moved to Southampton Univ.) with Sheila Trahar. SW explained that this was quite easy because annex 1 of the EU contract removes all the names from the GANTT chart and just calls people a senior or junior researcher. We can substitute people within each of those categories. SW will circulate the EU's definition of senior and junior researcher.

2. Management documents
- **Concept note- done.**
- **Work Package template- SR**

SR is working on the WP template. SW reminded her of the ideas included under item 3 of the notes from our meeting of 21 January.

3. Work Packages 1 and 2
WP 1 Jan 2010-June 2011   co-ordinator Susan Robertson

WP 2 March 2010- Oct 2011   co-ordinator Cris Shore

- **Detailed WP plans**
    - **Progress on WP1- deadline March 2010**
    - **Progress on WP2- deadline May 2010**

SR is working on the following for WP1:

- to ask everyone to send electronic versions of articles or conference papers on issues relevant to WP1 so as to create a digital archive of our existing knowledge
- as URGE concerns scholarship (added value on existing research) rather than new research, to focus on issues for future research

- to formulate a set of questions to prise open the WP's tasks in a manageable fashion.

SR agreed to write to everyone in the programme to ask who is interested in contributing to WP1. Those making visits have an absolute responsibility to deliver outputs but others may well also wish to contribute.

- **Visits**
    o **Peter Jones- visits have to be a minimum of 1 month and he can't do that in April/May 2010- but he wants to participate in WP2. Should he go to NZ later in the year or come to Denmark instead and another take his place? Can he or his replacement be funded via Bristol so we don't need to contract with another partner university?**

We agreed to invite Peter Jones to participate, eg in the December workshop, in a non-.funded way.

    o **Any other problems/arrangements we need to discuss?**

Sheila Trahar (Bristol University) will take over PJ's visit . She works on international students' experience of studying in Britain and is especially interested in methodology, using narratives in her own research.

SR and CS to co-ordinate over ST's visit which could be any time between May 2010 and May 2011, but should avoid mid January to mid February 2011 when CS is at DPU. If she wants to coincide with Gritt Nielsen's visit to Auckland , this is between Nov. 2010 and March 2011.

SR and RD are visiting Auckland for the whole of May 2010.

Stavros Moutsios starts his visit to Auckland next week.

- **Workshop Dates**
    o **WP1- first or second week of December- SR to decide date**

SW to decide a workshop date between 29 November and 6 December 2010.

4 people from DPU want to go on the Erasmus exchange to Bristol for this workshop. AU has just centralised the allocation of Erasmus funding, so there is great uncertainty over whether any will be allocated to DPU participants. SW to emphasis that IRSES grant depends on Erasmus exchanges and the EU expects us to have access to this money.

    o **WP2 –June 2011- CS - can Elizabeth Rata 'hop' from Bristol to DPU?** OK.

4. **Infrastructure**
- **Mailing lists- see below**

- **Website- report from Kris Olds/SR**
  - ○ **What texts are needed?**
  - ○ **What facilities are needed for virtual conferencing?**

SR reported that the website is being built over the next month or so.

SW asked SR to find out what kind of content and texts are needed so that she can prepare them during March and before her research leave starts in April.

There are 2 methods for virtual conferencing:

- Adobe connect just requires a laptop, a data projector and a microphone. Adobe connect software costs about $80 US or can be obtained for a free trial period.
- Access grid requires more sophisticated technology and sometimes the bridges between different institutions do not work well. CS has Access grid.

SW to investigate which method is possible at DPU.

Agreed that we should hold a trial run in early November 2010.

- **Logo- CS**

CS agreed to ask the graphics designer to try and do a logo during March so that it is ready for the website.

5. Reporting to EU

DPU's research support has not yet obtained the forms for financial and academic reporting, and their frequency**.**

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6. Proposed research unit on university transformations at Aarhus university
- **request for SR and CS to be international partners**

SR and CS agreed to send letters by Friday.

7. Financial Management
- **Monthly grant**

The monthly grant that we can use for visits is 1800 euros.

EU puts 5% of our grant into a reserve fund to help the project if someone runs off with the money, but the money is returned at the end of the project.

EU pays us 160% of our first grant instalment so we will have enough money to pay everyone the full monthly rate.

- **Payment arrangements with Bristol**

Svetlana to contact SR in order for DPU to arrange payments to Bristol.

8. Erasmus exchanges

- **week of 6 September 2010**-SR and RD to DPU
  - o **accommodation**

SR is making her own arrangements.

  - o **Teaching**

SR to send SW materials on her PhD course, in order for SW to make a proposal to DPU.

MALLL colloquium- arranged by Stavros.

EPOKE seminar- on progress with WP1 and feedback on visits so far.

Individual supervisions

- **first or second week of December 2010** See above.

9. **Date of next skype meeting:**

How about Tuesday 23 March either 9am or 8.30pm Danish time?

Third Skype conference of Project Co-ordination Team

(Sue Wright, Cris Shore, Susan Robertson)

29 April 2010, 8.30-10.30pm (Danish time)

1. Contractual documents
- **EU contract**

Still not arrived yet, but there is email confirmation that the project started 1 Jan 2010.

- **Consortium Agreement and Partnership Agreement**

Cris' query about Publication (8.3.1) had resulted in a revision of the text to protect academic freedom. Thanks for noticing this!

SW is yet to write the protocol on knowledge production. She is still looking for an example of such a protocol.

There is now agreement on the CA and PA. SLR and CS to get their people to sign them.

2. Management documents

SLR has not yet done a WP template but is developing the detailed plan for WP1

3. Work Package 1

SLR has sent an outline of WP1 to the 'inner core' – those involved in exchanges. Then she will send it more widely to others interested in WP1 (to include SW and Gritt Nielsen).

SLR and CS discussed the details of the WP1 seminar on global regionalism to be held in Auckland when SLR, Roger Dale and Stavros Moutsios are there.

SLR and RD will visit DPU on an Erasmus Exchange in September – agreed to re-run the global regionalism seminar and also present 2-3 papers they've been working on in Bristol.

WP1 final workshop in Bristol to be held between 29 November and 6 December 2010 to coincide with visits from NZ..

4 people from DPU have applied to AU for Erasmus funding but no reply yet.

These activities and associated Erasmus visits will include a considerable amount of training – in the reading groups, meetings with PhD students, linking junior to senior researchers.

Discussion of ideas for WP1 - Global regionalisms

SLR is mapping the actors involved in creating global regions of higher education

May confine it to mapping the globalisation of the Bologna Process in Asia, Africa, Latin America - asking why they are doing it, and what are the implications for Bologna as a norm-setting device?

Australia is especially interesting because half of its universities follow the US model and the other half follow Bologna.

CS said Singapore was also trying to face in both directions.

SW mentioned her student Que Anh Dang is looking to do a PhD on the export of Bologna via ASEM, and she is asking similar questions.

SLR said on the blog she does with Kris Olds, there are 2 speeches for the ASEM meeting in the Philippines with their slide shows and texts.

At Auckland, SLR wants to explore ways to study this concretely and theoretically.

This should all feed into the Bristol workshop at the end of the year.

Focus will be on theorising global regionalism – or globalising Europe. That is a way of understanding the world as made up of regions that are under construction.

This builds on Bristol's current work on a special issue of the journal GES on regulatory regionalism, which will be a source for publishing this work.

Regulatory regionalism argues that governing tools are central to the construction of regions. This is more important than their de jure creation, or arrangements between nation states. Bologna is an important vehicle for regions being globalised.

This was a new concept to CS – who is familiar with world systems theory and Appadurai's grassroots globalisation.

SLR said at Bristol (and also Peter Jones) they were front-runners in working with these concepts on the critical political economy of education, and she will introduce the concept at the seminar in Auckland and in September at DPU (This is an example of knowledge transfer through IRSES).

Then the WP1 workshop in Bristol could really focus on the theoretical tools needed for this approach and there could be presentations on existing or new papers

Meanwhile, SLR will circulate all URGE participants to ask whether they are working on anything that speaks to the objectives of WP1, and will put links to their existing publications that contribute to this issue on the website, along with the programmes and powerpoints from the seminars.

Any other WP arrangements/visits we need to discuss?

Gritt Nielsen is likely to continue in employment at DPU, but may have to change the dates of her visit to NZ.

Agreed that SW should invite Jill Blackmore to participate in URGE, but with her own funding. SW to send her the Annex describing the project.

This also helps make ties between URGE and the proposed RUUT (research unit on university transformations at Aarhus university)

Agreed Peter Jones should be on the mailing list, kept in circulation, and invited to the WP1 workshops at DPU in Sept and at Bristol in December 2010.

Sheila Trahar (Bristol University) yet to be asked to participate.

4. Infrastructure
- **Website- report from Kris Olds/SR**

SR reported that Kris Olds will be working with software developers on the URGE website over the next 2 months.

SW will be asked to supply about 100 words on what URGE is and does

- **Logo**

CS has got the logo designed and ready.

- **Virtual conferencing**

SW reported that DPU does not have Access Grid.

SLR explained that Adobe works by each individual having their own PC, so this is not optimal.

SW to inquire whether Access Grid is available at Copenhagen University or Copenhagen Business School.

Jens Winther, DPU's technician asked for the names of the UoA and BU technicians, so they can get in touch with each other to sort this out and hold a trial run in November 2010.

It is becoming clear that the infrastructure in universities is not very good for trans-institution research – they need bridges between the different platforms. In the UK, JISC, HEFCE's technology arm, is funding infrastruecture to enable transnational research.

- **Bulletins**

SW to compile materials supplied by SLR and CS for an email bulletin on what is happening and what we have done

To include

- bullet points on what the NZ reading group has been doing
- Info on the workshop on global regionalism to be held by SLR/RD in Auckland
- SLR also suggested circulated a zipped file of the readings for that workshop
- Stavros 500 words on his visit – who he is meeting, what they are talking about, what has surprised him about the academic culture in NZ – not just evidence of activity but also the colour and character of the exchange. (Stavros has been hospitalised and had an operation during his visit.)

5. Reporting to EU

Still no information available on what is required.

SLR said it would be important to keep an evidence trail:

- dates of visits
- lists of all those who attend seminars and workshops – easiest done by circulating a paper asking for their names and addresses and promising a copy of the papers.
- adverts for seminars – showing they were announced across the university
- seminar course materials
- publications
- these meetings are also outputs

6. Financial Management

No money available until EU sends the contract. Universities are having to fund the visits meanwhile.

7. Erasmus exchanges

- **week of 6 September 2010-**SR and RD to DPU

SR to send SW materials on her PhD course, in order for SW to make a proposal to DPU.

URGE seminar with the EPOKE group - on Global regionalisms (see above)

8. Date of next Skype meeting:

To be arranged after SW returns from 4 months research leave at Cambridge, UK

To include WP template, WP plans, publication plans.

Meeting between Sue Wright and Susan Robertson (and Roger Dale)

After LLAKES Conference, Institute of Education, London

6July 2010, 5.00-6.00 pm

1. **Work Package 1**
   o   Reporting on NZ visits
   To include:

   Reports (2-4 pages) from SLR, RD and Stavros Moutsios on their visits (see suggested content in last URGE meeting minutes + reflection on ideas and practices of knowledge exchange in NZ context – see below) SLR offered to get these as part of the WP Coordinator's task.

   Reading group on Global regionalisms – posters, powerpoints and zipped file of readings

   Stavros' presentation to the Reading group

   Capacity building – meetings with doctoral students

   o   We'll abstract from these a reporting format for the other WPs to follow.

   o   Final report on WP1
   To include:

   Detailed plan for WP1

   Activities of core participants

   Involvement of other URGE participants (e.g. Gritt Nielsen and SW)

   Mapping exercise

   Deliverables

   Seminars

   Workshop

   Powerpoint presentations

   Publications – Regulatory regionalism

   SLR is in discussion with Edward Elgar about a book from WP1

   Outline of priority areas for further research into internationalisation of SLR agreed to circulate the WP1 plan to everyone and ask them whether they are working on anything that speaks to WP1 objectives.

- o Still need to abstract a template for preparing the other detailed work packages – using minute of 24 Feb

- o WP1 workshop in Bristol – on the Critical Political Economy of HE: Imagined Economies and the ways they are institutionalised

2. **Erasmus visit by SLR and RD to DPU, Sept 2010**
   - o Week's programme [since changed to 5-9 Nov]
   Mon and Tues – PhD course

   Wed – URGE seminar

   Thurs – MALLL colloquium

   Fri – hopefully Gritt Nielsen's viva

   - o PhD course
   Detailed plan

   RD presentation on his work on Erasmus Mundus

   Advertising the PhD course

   SW to circulate in Denmark – including Palle Rasmussen, and to anth depts. In Scandinavia

   SLR to circulate to her Scandinavian contacts – Bergen, Oslo, Finland.

3. **Infrastructure**
   - **Website-**
   Kris Olds is working on it now.

4. **How to use our fieldnotes about developing a knowledge community?**
   Discuss how transnational collaboration is seen as the way to transfer knowledge

   Discuss the mechanics and politics of this.

   How knowledge is codified as intellectual property

   How policy documents on knowledge transfer pretend developments in the university around the politics of knowledge are unproblematic.

Institutional policies – anything SLR writes on her blog is owned by Bristol Univ – used in branding

In NZ these debates have an extra dimension because what does it mean to do knowledge exchange where Maori have intellectual property in an invented a form.

Colonised by IP talk plus strong commons view – jars with ?intellectualism??

SLR, RD and Stavros should reflect on this in their report of NZ visits.

Meeting between Sue Wright and Cris Shore

26 August 2010

   1. **Future Visits**

Cris Shore will visit Bristol from about 27 Nov to 18 Dec 2010.

Chris Tremewan will visit Bristol for the week of the workshop

Melissa – her future employment is uncertain, so her visit is uncertain

Nick Lewis – is likely to be in Bristol anyway, so will participate in the workshop.

Gritt Nielsen is being employed to develop an 'international' master programme at DPU, so is not able to visit NZ this winter. SW will find out how to move her visit forward, maybe to next year.

   2. **Workshop in Bristol, 2 Dec 2010**

3-4 participants from NZ (see above)

4 participants from DPU – **news! We have got Erasmus funding!**

No need to video the workshop for DPU and NZ, as most will be attending

   3. **Past visits**

During SLR, RD and SM's visits to Auckland, there were the following events:

Stavros gave papers to the departments of anthropology and education

Stavros held a session with postgraduates

Stavros session at the Reading Group

Roger gave a paper

Susan gave a paper

Symposium on Internationalisation of higher education – all three participated – explored the big picture and trends - front page news on the university website

CS has sent SW the webpage details of these events

SLR in meeting with SW on 6 July offered to prepare a report, getting reports on each of the visits, and including powerpoints of presentations and zipped readings from the symposium.

Fourth Skype conference of Project Co-ordination Team

(Sue Wright, Cris Shore, Susan Robertson)

13 Sept 2010, 22.00-24.00 (Danish time)

– very bad Skype connections with continual interference and repeated breakages.

1. **Contractual documents**
- **EU contract**

Contract arrived at end of October 2010.

DPU to push EU for 1st payment and expedite transfer of funds to Bristol as soon as possible as SLR and RD have personally paid for their visit to Auckland.

2. **Work Package 1**

SW has now received detailed plan of WP1.

SLR to circulate to SW and CS within 2 weeks a report on Auckland visits for WP1 - a list of activities/deliverables including accounts by those who have made the visits, powerpoints of presentations, lists of attendees, work with PG students, etc

Auckland Seminar – great success - RD and SLR attracted huge interest, front page of university website, 30 people, important for the launch of the project at the university.

SLR and RD visit to DPU on an Erasmus Exchange, 6-9 November

- o Sunday 7 Nov URGE/EPOKE social/meeting to report on NZ visits, update on WP1, and plan EPOKE's Erasmus Exchange to Bristol in 1st week of December 2010
- o URGE seminar cancelled because DPU decided to hold its annual fest on that day
- o PhD course 8-9 Nov taught by SLR, RD and SW

WP1 final workshop in Bristol, 2 Dec 2010

- o Visits from NZ – Shore, Tremewan, Spencer, Lewis
- o Visits from DPU – Wright, Nielsen, Moutsios, Bovbjerg
- o Visits from within UK - Jones
- o WP1 Final Workshop on 2 December.
  Title: Critical political economy of HE: Imagined economies and ways they are institutionalised.

  SLR to circulate a plan for the day including keynote, presentations, panels – SW and CS to discuss with their groups and send comments so SLR can revise as appropriate.

  Aim for 30-40 people

3. **Work Package 2**
   - CS circulated a Detailed Plan – SW sent comments – CS revised
   - Visits
     - Gritt Nielsen - she has been employed at DPU to develop a new MA programme so cannot visit on the planned dates. Her personal circumstances also make planning difficult at present. She is determined to visit Auckland, but question is when. SW to discuss this with her.
     - Peter Jones – SLR to contact him to see if he is still interested to visit Auckland and to discuss with the legal people (Jean Pritlove?) what kind of attachment he would need to Bristol to do so.
     - Sheila Trahar – if Peter Jones cannot use (all) his visit, SLR to ask Sheila Trahar if she would be interested to join URGE and go on a visit to Auckland.
   - Changes to EU contract? Scheduling these visits (especially Gritt's situation) might mean expending the end date of WP2. When the EU contract is completed, SW to ask Astrid how make such changes. There is no problem about substituting one person with another, as long as they are within the same EU category (nearly all our participants are mature researchers) but if we change the duration of a WP, or change the number of visits in a WP, this might need a contractual change.

4. **Other Personnel**
   - Agreed that SW should invite Jill Blackmore to participate in URGE, but with her own funding. SW to send her the Annex describing the project.
     NOTE: The idea was that would help make ties between URGE and the proposed RUUT (research unit on university transformations at Aarhus university) but the Danish Research Council has since rejected the RUUT application.

   - Agreed Peter Jones should be on the mailing list, kept in circulation, and invited to the WP1 workshops at DPU in Sept and at Bristol in December 2010.

5. **Infrastructure**
   - **Website-** Kris Olds is working on the architecture now. It has been delayed for 2 months because of a change of team. Because there is no EU funding for this infrastructure, URGE is parasitic on another project, and therefore not fully in control.
     - SW to draft
       200 words on About URGE –   who is involved - EU and MOST funded

       1-200 words on What does URGE work on – 6 work packages

     - SLR and CS to draft
       WP1 – objectives, tasks, deliverables

       WP2 – objectives, tasks, deliverables

     - SLR and CS to collect material for the next level
       Details of events, presentations, papers

Working paper(s)

Other publications

- o **Virtual conferencing**
  CS and SLR to sort out electronic communication of the Bristol December WP1 workshop to Auckland.

  SLR interested in convening a meeting to explore the technologies and their shortcomings, so as to point out how much more we could do in terms of knowledge exchange if we had adequate technology, and how much it would save in airfares.

- o **Bulletins**
  To include

  - – bullet points on what the NZ reading group has been doing (received from CS)
  - – WP2 outline (received from CS)
  - – WP1 outline (received)
  - – WP1 information and flyers for events during the visits to Auckland (received from CS)
  - – SLR also suggested circulated a zipped file of the readings for that workshop (awaited)
  - – WP1 report on visits (see Point 2 above) SLR originally suggested this should include 500 words by Stavros, RD, SLR on their visits –not just evidence of activity but also the colour and character of the exchange (awaited from SLR)

- o **Publication protocol**
  SW to do

6. **Reporting to EU**
   Report required every 2 years

   Note from previous Skype meeting - SLR said it would be important to keep an evidence trail:

   - o dates of visits
   - o lists of all those who attend seminars and workshops – easiest done by circulating a paper asking for their names and addresses and promising a copy of the papers.
   - o adverts for seminars – showing they were announced across the university
   - o seminar course materials
   - o publications
   - o these meetings are also outputs

7. **FP7 Initial Training Network**
   - o NZ does not have an agreement with EU on ITNs. Royal Society mobility funding does not include teaching – CS to inquire whether research training counts as teaching or research. It would still be good to find a way to include Auckland.
   - o SLR to consider whether she/Bristol would be interested to be a partner
   - o Other possible academic partners

- - Rebecca Boden UWIST, UK – critical accounting - good on the link between university reform and funding policies - SW approached her and she is interested.
  - António Magahães, *Centre for Research in Higher Education Policies, (CIPES), University of Porto* – good critical approach to the philosophy of knowledge based economies - SLR to ask him if he would be interested.
  - Pavel Zgaga, University of Ljubliana – expert on Bologna and regionalisation/globalisation of HE - SLR to ask him if he would be interested.
- Other possible practitioner partners
  - OECD – SLR - Kris Olds has links to Richard Jelland at OECD
  - European Students Association – SLR has good links
  - EU
  - UNESCO
  - EUA
  - International Unions Assoc – SW to ask Jens Vraa, DM.
- Considerations about the other partners
  - Different parts of EU – Scand, UK, South, East
  - Who are the interesting people we want to work with – critical approaches
  - Funding is allocated per country, not per institution

Notes of URGE Meeting of DPU EPOKE group, Susan Robertson & Roger Dale

Sunday 7 Nov 2010

Present

Roger Dale, Susan Robertson, Gritt Nielsen, Stavros Moutsios, Kirsten Marie Bovbjerg, Dirk Michel, Susan Wright

Background to URGE

As the meeting included both original and new members of EPOKE, SW gave an introduction to the aims and organizations of URGE.

 All were given a pack with the following documents Concept note, Outline of 6 work packages, Chart with visits, detailed plans for WP1 and WP2.

WP1

A brief resume was given of:

- NZ visits – Stavros, Susan, Roger – what achieved (knowledge exchange, new knowledge)
- Susan and Roger's visit to DPU – PhD course

Plans for DPU's and Auckland U's visit to Bristol (+ Peter Jones + Sheila Trahar)

- WP1 final workshop – rather than cram all the work into one day, decided to hold a seminar on each of the four 'deliverables' during the week

    o Monday 29 November afternoon – 'hello' event to introduce ourselves, go through the plan for the week (SLR) and URGE issues (Authorship protocol SW)
    o Go out to dinner

    o Tuesday 30 November 10.00-12.00 Task 1.1 workshop: **Mapping and developing an account of the range of actors/institutions involved in processes of globalisation and regionalisation**, including their interests, scales of influence, and temporal horizons. (SLR will provide a 5-6 page draft section of the working paper on this in advance)
    o Tuesday 30 November 14.00-16.00 WP2 planning session (Coordinator Cris Shore) Meeting for participants in WP2 plus anyone else interested - discussion and planning contributions, visits, activities/workshop, working paper and other publications

- o Wednesday 1 December 10.00-12.00 WP3 planning session (Coordinator Roger Dale)- discussion and planning contributions, visits, activities/workshop, working paper and other publications
- o Wednesday 1 December 13.00-15.00 <u>Task 1.2</u> **: Examining the role of higher education policy in globalisation processes** (e.g. shifts from servicing to driving development of a knowledge economy and from aid to trade as a means of capacity building) – and the **role played by European higher education agencies (BFUG, EUA) and their projects (EQF)** as potential models for other world regions. (Stavros and RD/SLR will prepare a short problematic + send the articles it is drawing from)

- o Thursday 2 December 16.00-18.00 <u>Task 1.3 :</u> Identifying the role of key transnational agencies in **policy travel** and in new forms of transnational governance (Roger will prepare a short paper, contributions by SW, SM, K-MB and any others)

- o Friday 3 December 10.00-12.00 <u>Task 1.4:</u> **Analysing processes of transformation** – e.g. processes operating simultaneously on different scales, **PLUS review** of the process so far – any improvements to be made – what we have achieved – involvement of others (Jill Blackmore, Que Anh Dang, Peter Jones, Sheila Trahar, Tomas Muir at BU, PhD on HE regions) - what we aim to achieve in next year

- Cris Shore's lecture will probably be on Wednesday evening (SLR arranging)

- RD gave KMB names of hotels for her to arrange the DPU contingent's accommodation and suggested National Express coach from Gatwick to Bristol.

ITN

SLR and RD agreed to contact potential partners to see if they are interested:

- Pavel Zgazga, University of Ljubljana
- Antonio Magahaes, Centre for Research in Higher Education, University of Porto.

Application deadline 26 Jan 2011, so partners and plans need to be in place by December.