Expanding the Horizons of the Referentiality Approach

Iryna Kushnir
School of Social and Political Sciences, the University of Edinburgh
I.Kushnir@sms.ed.ac.uk

Abstract

The referentiality approach is defined in education policy literature as a theoretical stance that advocates using four main types of mechanisms – externalisation, deterritorialisation, self-referentiality and reterritorialisation – to provide sources of authority by national policy makers to justify education reforms. This article finds such a conceptualisation of the referentiality approach limited and puts forward the argument that this approach has scope for further development. The example of the analysis of the implementation of the Bologna Process, which is a European intergovernmental higher education policy initiative, in Ukraine is used to illustrate the prospects of the development of the referentiality approach. The argument in the article is developed on the basis of a critical analysis of the literature that uses the referentiality approach, and on the basis of empirical evidence from Ukraine. This evidence contains exemplary extracts from 10 semi-structured interviews with national policy makers, representatives from national and international organisations that deal with higher education in Ukraine, and staff members and instructors at two higher education institutions in Ukraine. Expanding the horizons of the referentiality approach is aimed to contribute to a wider and richer application of the referentiality approach in education policy research.

Introduction

The referentiality approach is a theoretical stream which, according to Steiner-Khamsi (2002), is concerned with 'using references as sources of authority – internal or external, domestic or international' to justify reforms by national policy makers (p. 70). The referentiality approach has been used in the literature on education reformation recently by, for instance, Steiner-Khamsi (2002), Luschei (2004), Silova (2004) and Vavrus (2004). However, the usage of this approach remains overshadowed by other more widely used approaches such as institutionalism, neo-institutionalism, and the advocacy coalition theory, to name a few. The fact that the approach has not gained much popularity in the literature, despite its, arguably, rich research potential, might be attributed to its current narrow theoretical scope. This approach has been currently associated only with four referentiality

mechanisms: externalisation, deterritorialisation, self-referentiality and reterritorialisation, the meanings of which will be elaborated on below. Additionally, the application area of this approach has been limited only to the analysis of the mechanisms that national policy makers use to justify reforms.

This article aims to make a theoretical contribution to the literature on higher education (HE) reformation by arguing that the referentiality approach has scope for further development in at least three such directions. First, the current application of the approach to the analysis of mechanisms, used only by national policy makers, should be extended to include other actors that participate in the policy implementation process. Second, the current usage of the approach to analyse how new policies are justified should be expanded to the investigation of reactions to reforms. Third, the referentiality approach should be viewed not as a container of four referentiality mechanisms mentioned above, but rather as a ground for an exploration of new mechanisms at work in education reformation process. This argument is critical for the development of new horizons in the application prospects of the referentiality approach.

This argument is developed in the following way. First, the origin and essence of the referentiality approach and its three referentiality mechanisms are explained in detail. Second, the prospects of the development of the referentiality approach are illustrated by the example of the implementation of the Bologna Process (BP), which is a European intergovernmental HE policy initiative, in Ukraine. This country presents an interesting site for research on the perspectives of the referentiality approach because of a widespread acknowledgement of the idea in the literature on Ukrainian policy-making that this country's position on the crossroads between Russia and Europe makes it both nostalgic for its Soviet past, and desirous of joining the European Union (EU; D'Anieri, 2012; Fimyar, 2008; Kolisnichenko and Rosenbaum, 2009; Osipian, 2010; Riabchuk, 2012; Shulman, 1999). Such dualistic aspirations provide for a diversity of expressive ideas, which can serve as clear examples to support the main argument of this article. The case of the Bologna Process implementation in Ukraine is used in three ways: to demonstrate that referentiality mechanisms can be used by not only national policy makers, as maintained by the current version of the approach, but also by other actors too; to put forward the idea that referentiality mechanisms can be used to react to reforms in addition to the established thesis that they are used to justify reforms; and to suggest a mechanism which has not been explained by the referentiality approach yet.

The argument is developed through a critical exploration of literature that uses the referentiality approach, as well as through the analysis of empirical evidence from Ukraine (which was collected in 2013 through an ongoing PhD project that looks at the Bologna Process policy learning in the Ukrainian context). This evidence contains exemplary extracts from ten semi-structured interviews with national policy makers, representatives from national and international organisations that deal with HE in Ukraine, and staff members and instructors at two higher education institutions (HEIs) in Ukraine. The interviews were conducted in Ukrainian in October-December of 2013 and translated into English. They are used in this article as personal communication in accordance with the British Educational Research Association (BERA) ethical guidelines for educational research (BERA, 2011).

1. The Referentiality Approach

This section provides a review of the literature which discusses and uses the referentiality approach. This approach emerged through the combination of the self-referential social systems by Luman and the externalisation thesis by Schriewer (Perry and Tor, 2009). The approach has been developed to denote four such referentiality mechanisms: externalisation, deterritorialisation, self-referentiality and reterritorialisation.

Externalisation is the most frequently analysed mechanism in the literature. It is used by national policy makers to facilitate change at the national or local levels, and is commonly presented as 'lessons learned from abroad' (Steiner-Khamsi, 2002: p.70) and a 'radical departure from the undesired past' (p. 82). Explicit or implicit references to the idea of externalisation are also traced in the works of Phillips (2006) who mentions 'the foreign country as an argument [for change]' (p. 553); Steiner-Khamsi (2006), who mentions 'external sources of authority' (p. 671); and Lawn and Lingard (2002) who dwell on the 'external force' to push change at the national level (p. 302). What is characteristic of all these ideas related to externalisation is that all of them pertain to a clearly demarcated geographical space.

Deterritorialisation is a mechanism used when there is an absence of distinct geographies but when there is a necessity to use external references. Steiner-Khamsi (2004) and Vavrus (2004) maintain that references to imaginary international standards are made by national policy makers to justify reforms in case of inability to identify a concrete country from where the policy is intended to be borrowed.

Self-referentiality stands for the idea that 'educational systems perpetuate themselves

by means of internal references, notably, references to tradition... however, internal references fail to justify the persistence or introduction of reforms' (Steiner-Khamsi, 2002: p.70). While the author implies that self-referentiality is productive only to maintain the established ways of doing education in a certain context, it can also be claimed that self-referentiality has a reform potential at least when referentiality shift happens, as discussed below.

Reterritorialisation means a move from externalisation to internalisation, and then from internalisation to indigenisation (Steiner-Khamsi, 2002). This is a discursive shift which marks the beginning of the presentation of external ideas as internal.

Beside this clear conceptualisation of referentiality mechanisms, there are some discussions of the mechanisms that deviate from the definitions above. Specifically, Schriewer and Martinez (2004) seem not to recognise the above definition of self-referentiality because they define it as 'externalization to tradition' (p. 31). However, this case can be justified by looking at externalisation as Schriewer and Martinez's main focus. According to Perry and Tor (2009), Schriewer is the founder of the externalisation thesis, which formed alongside the self-referential systems theory by Luhmann the basis of the referentiality approach. Schriewer and Martinez's (2004) different perspective on self-referentiality is provided here to demonstrate the necessity to acknowledge that the demarcation of the referentiality mechanisms outlined above should not be treated as universal or finalised.

2. The Referentiality Approach to the Bologna Process Policy Implementation in Ukraine

After explaining the essence of the referentiality approach and its three referentiality mechanisms, I will now apply this approach to the case of the Bologna Process (BP) policy implementation in Ukraine. The BP emerged in 1999 and has targeted the harmonisation of HE systems in its signatory countries through a range of such objectives as the adoption of comparable and compatible degree systems; cycles of studies such as Bachelors, Masters and PhD, the European Credit Transfer System; the Diploma Supplement; the promotion of student and staff academic mobility; quality assurance; the attractiveness of Europe and some others. The achievement of these objectives is a matter of the voluntary initiative of forty-seven states which are mostly from the EU and nearby (EHEA, 2010). Ukraine officially joined the BP in 2005. The dualistic aspirations of this country in terms of its Soviet past and

its European prospects, explained in the introduction, provide for a diversity of expressive ideas which can support the central argument in this article.

This section of the article is further divided into three parts that are used to suggest the following: that there are a variety of actors that use referentiality mechanisms; that these mechanisms can be used to react to reforms in addition to the established notion that they are used to justify reforms; and that the current list of mechanisms in the referentiality approach lack one particular mechanism. The discussion below is based on the analysis of literature and empirical evidence from Ukraine. This discussion aims to explain and illustrate the idea, stated above, that the referentiality approach has a space for development.

2.1 Not just National Policy Makers

Despite a common assumption in the literature that it is the national policy makers who exercise referentiality mechanisms, there are statements which point, albeit weakly, in the direction that the generators of referentiality mechanisms should be further investigated. Schriewer and Martinez (2004) claim that the referentiality approach 'stresses the idiosyncrasy of meaning in specific nations, societies or civilisations, and thereby brings into relief the persistence of *multiple worlds'* (p. 33). These authors emphasise the possibility of differences in the sources of authority for reforms among nations, without exploring who actually created these references. Vavrus (2004) takes the idea of differences further and argues for their possibility within one nation. Although the author does not provide any further explanation for this claim, it nonetheless serves as a departure point for hypothesising that referentiality mechanisms are used by different actors within one nation. This hypothesis challenges a common approach in the literature to look at the references created by national policy makers only. This hypothesis is supported by the empirical evidence from Ukraine below.

Before illustrating the idea that national policy makers are not the only actors who exercise referentiality mechanisms, it is essential to define the limits of this group of actors. In the case of Ukraine, the national policy makers in the Bologna Process are the President, representatives from the Parliament, the overall Government and the Ministry of Education and Science (MES) specifically (Danilko, 2014). The national policy makers do use referentiality mechanisms to justify the reforms they promote. A representative from the Ministry of Education and Science of Ukraine observes the following:

We implement Bologna because we need to keep up with Europe and the rest of the

world… We make international agreements about academic mobility. We have many agreements with Russia, Kazakhstan and other post-Soviet states… By these agreements we demonstrate our loyal attitude to post-Soviet countries (personal communication, November 13, 2013).

This quote demonstrates that national policy makers use different referentiality mechanisms. In particular, there is a place for externalisation to Europe, which is the space where the BP is implemented, and even deterritorialisation to the whole world, which obviously cannot be viewed as a source of authority for the BP implementation. Self-referentiality can be traced by the fact that the promotion of academic mobility in the BP framework is not focused on the European region. It extends further to the east, encompassing post-Soviet countries with which Ukraine shares both the past, and common HE traditions. A reason for the references to the post-Soviet countries is most likely because of the fact that the HE community in Ukraine is familiar with the context of post-Soviet countries, and thus, looks up to them when dealing with similar issues associated with the implementation of the BP policies.

Other actors that do not belong to the national policy makers' cluster use similar mechanisms to justify why they implement the BP. HEI staff members and instructors, as well as members of national and international organisations that deal with HE in Ukraine, are among these actors:

We look up to the EU… The essence of the Bologna Process here is associated with the transfer into a new quality of education in accordance with European standards… The Bologna Process facilitates greatly Ukraine's integration into the EU… And since we are heading to the EU, we should share the desire to implement Bologna (personal communication with a HEI instructor, October 8, 2013).

Ukrainian higher education reform experts working in the framework of the TEMPUS Program referred to the Polish experience when developing the Bologna Diploma Supplement in Ukraine. Poland is the closest European country to us. It is very useful for us to hear how they solve similar problems (personal communication with a TEMPUS Office worker, October 25, 2013).

Both quotes above exemplify the usage of externalisation by two actors that do not belong to the national policy makers' cluster. Similarly to the national policy makers discussed above, both a HEI representative and a TEMPUS Office worker use the European

region as a source of authority for implementing the BP reforms in Ukraine. The choice of Europe might seem quite natural for the latter actor because it represents an organisation established and funded by the European Commission that, to a great extent, contributes to steering the BP along with signatory country representatives (Corbett, 2011). The TEMPUS Programs that this organisation administers aim 'to support higher education modernization in the Partner Countries of Eastern Europe, Central Asia, the Western Balkans and the Mediterranean region, mainly through university cooperation projects' (EACEA, 2013). The same reference by a HEI representative might be seen as having been taken up from the national policy makers. Even so, there are externalisation references made by HEI representatives. These references focus on a different external source of authority for the implementation of the BP reforms:

> Something is decided by the Ministry, and then we have to implement it. No one asks our opinions, we have all these documents that arrived to us from the top, and we have to act according to them… We implement the BP because we are told to do so by the Ministry (personal communication with a HEI dean, October, 24, 2013).

Externalisation is not the only referentiality mechanism used by actors that do not belong to national policy makers. One example is self-referentiality used by a national non-governmental organisation which deals with HE. Unlike the national policy makers who are concerned with pushing reforms more than with outlining stumbling blocks during the reformation process, a representative from this organisation uses references to Ukrainian Soviet past as a hindrance on the way of the BP reforms:

> Bologna in Ukraine is an amalgamation of innovations and Soviet traditions. We are excelling on all indicators in many national and international reports. However, the reality is that many reforms are progressing very slowly or not progressing at all because of incompatibility of certain issues. For example, we cannot make out universities autonomous because of the centralised funding system, and we cannot implement the PhD degree properly because of two post-Masters degrees we have had (personal communication, December 3, 2013).

Another example of different referentiality mechanisms used by actors that do not belong to national policy makers is reterritorialisation (which, to reiterate, stands for the conversion from externalisation to self-referentiality). Examples of reterritorialisation are seen in the policies, such as the Three-cycle System of studies, the Diploma Supplement, the

Credit System, the National Qualifications Framework. These policies are external to Ukraine but are claimed to be a logical continuation of previous internal developments as their overall ideas are a bit similar. For instance, reterritorialisation is used by a HEI dean who states that the Credit System is not a new policy idea:

> The Credit System is not completely new for us. We had the Module System in our country even before the Bologna Process. We have combined the credit principle and the module principle. They are compatible, they are very similar (personal communication, December, 10, 2013).

Claiming that the Module System that existed in Ukraine is similar to the Credit System suggested by the BP, and that the Credit System is, hence, a Ukrainian tradition is quite arbitrary. The Credit System is stated in the Prague Communique (2001) as a means to support student mobility through assigning credits to student workload which can be accumulated and transferred among the BP countries and HEIs. Unlike the Credit System, the Module System is about evaluating students' academic performance after each topic during a semester. This form of assessment after each topic is positioned as an alternative to an end-of-semester evaluation of academic performance (decree №161, 1993). A presentation of an internal Module System as an external idea, linked to the Credit System, exemplifies reterritorialisation.

The discussion of the Ukrainian case in this subsection has demonstrated that it is not only national policy makers who create references to push reforms, but other actors too. They use different referentiality mechanisms denoting both the sources of authority that the national policy makers identify and other sources of authority which include national policy makers themselves.

2.2 Justifying Reforms, but not only

After explaining that the referentiality approach is applicable to the analysis of the references different actors make, it is time to move on to the exploration of the purposes of the referentiality mechanisms. It was already stated earlier that the justification of reforms is the purpose of referentiality mechanisms mentioned in education policy literature. This subsection of the article demonstrates that this is not the only purpose. Additionally, various references are used by different actors to react to the implementation of reforms by searching for answers to contradicting issues. In other words, referentiality mechanisms serve as ordering devices in uncertainty.

To provide more evidence from the literature that references are made to justify reforms, the following information is presented. Most of the authors dealing with the referentiality approach agree that the referentiality mechanisms are used to provide justifications for reforms. The only exception seems to be the claim by Takayama (2010), who argues that externalisation conceptualises policy borrowing as a necessity for modernisation, and thus, does not address 'why it works to mobilise people at a particular time in history' (p. 57-58). However, a number of other scholars maintain the opposite. For instance, a group of authors argue that a crisis in a national education system is a reason for externalisation that helps to adopt foreign policies (Crompton, undated; DeJong-Lambert, 2004; Luschei, 2004; Steiner-Khamsi, 2004; Vavrus, 2004). In addition, Vavrus (2004) also mentions that externalisation can be used to minimise conflict between internal and external agencies. And Silova (2004) refers to Steiner-Khamsi's claim that externalisation can be used by policy-makers to push new educational reforms which otherwise would be resisted. There are also similar but more general remarks pertaining to all referentiality mechanisms. Specifically, Schriewer and Martinez (2004) and Vavrus (2004) also mention that the referentiality mechanisms can be used to enact the need to supplement meanings.

The last idea about supplementing meanings, which is not further elaborated by the authors, can be seen as a departing point for the development of the statement that referentiality mechanisms serve as ordering devices in uncertain situations that occur as a result of the implementation of reforms. The same ideas can be used to argue different things that shift the meaning of referentiality mechanisms. The clearest example is reasoning about Soviet and European HE traditions in Ukraine. Both of them are presented as external and internal phenomena to Ukraine. The majority of interviewees, except for the national policy makers, mention the Soviet HE to express their nostalgia for the previous HE. They call it the Ukrainian tradition in the BP context; whereas the foreign European BP is positioned as a threat to this tradition:

> There are a lot of comments that we used to have a really good system of higher education in the Soviet times, and the BP broke everything (personal communication a representative from a non-governmental student association, October 4, 2013).

The main reason why the national policy makers tend not to express such a view is most likely because it would not justify the BP reforms. The center tends to use mainly either externalisation or reterritorialisation. A contrasting view to the one contained in the above

quote is expressed by different actors, including the same individuals who agree with the above explained idea, to argue that the Soviet HE system is outdated and that Ukraine needs the BP to develop its own HE system by keeping the pace with Europe:

> We cannot use the same principles and build higher education system the way it used to work in the Soviet Union. The Bologna Process has a potential to facilitate the development [of national HE] (personal communication a representative from a non-governmental student association, October 4, 2013).

After all, the purpose of the referentiality mechanisms is not only to justify reforms but also to react to them. Reactions of different actors to the implementation of reforms are expressed in searching for answers to contradicting issues. The selective nature of the ideas enacted in referentiality mechanisms, mentioned by several authors (Luhmann, 1990; Schriewer and Martinez, 2004; Takayama, 2010), can be seen as an enabler for actors to use references to react to reforms in certain ways.

2.3 Reverse reterritorialisation as another referentiality mechanism

Having argued that referentiality mechanisms can be used by multiple actors to justify and react to the reforms, the investigation of the possibility to acknowledge more referentiality mechanisms at work will follow. The argument developed further is that there is such a possibility indeed at least based on the example of an apparent reverse reterritorialisation noticeable in the Ukrainian case (to reiterate, reterritorialisation is conceptualised in the referentiality approach as a shift from externalisation to self-referentiality). Thus, reverse reterritorialisation, which is argued to take place in the Ukrainian case, is the shift in the opposite direction – from self-referentiality to externalisation. Reverse reterritorialisation was found out to be related to the following two processes. One is the presentation of the external BP as internal developments, essentially unrelated with the BP action lines, such as improving computerisation of HEIs, raising instructors' salaries, and increasing paper work. Such references were made mainly by HEI representatives:

> We still have problems with access to famous libraries. Our library does not buy access to world literature sources… And it is supposed to, because that is what the Bologna Process is partially about. The Bologna Process is not serving its functions in Ukraine (personal communication with an instructor, October 10, 2013).

> We as HEI workers expect salary raising in result of the BP. Europeans have higher

salaries. We dream to have salaries that would be at least similar to the salaries that instructors at European HEIs get (personal communication with an instructor, October 10, 2013).

And more paper work related to reports appeared. We need to report in different ways and forms about everything. Deans and professors got more paper work to do. Old Soviet methods of reporting were not cancelled and new paper work related to the BP was added… The Bologna Process just added more inconveniences for us (personal communication with a dean, October 13, 2013).

The ideas expressed in the three quotes above show how the persistence of internal problems of limited access to international journals and libraries, instructors' underpayment, and excessive bureaucracy become viewed as a failure of the implementation of external reforms. Rather than looking for internal solutions for internal problems, impossibility to do so is externalised to an invented unsuccessfully used function of the BP to do so.

The second process related to reverse reterritorialisation is the reaction to the BP in the form of justifying negative effects of internal reforms that are disguised and/or perceived as the external reforms related to the BP. One example is brain drain, which is largely driven by economic migration (Tarapov, 2001), is positioned as a consequence of the BP because the BP opens up more opportunities for mobility:

It will be good for Europe if young people leave Ukraine for Europe. But it will not be good for Ukraine – brain drain… I am afraid the best people will leave, and who will work here? I do not want Ukraine to become some appendix, a provider of good work force for Europe (personal communication with a dean's assistant, October 28, 2013).

This statement is made on the ground of assuming that brain drain correlates with the BP only while it was the case even earlier (Tarapov, 2001). This statement is also made by assuming that the BP actually encourages permanent migration of students or graduates who choose to be mobile, while, in fact, it is not indicated so in any BP documentation. Another example of justifying negative effects of internal reforms, which are perceived as the external BP reforms, is the correlation of the BP with state funding saving plans through in-class study time decrease, and a consequent equation of the BP with this internal reform:

[There is] a tendency, which is developing slowly, to reduce the time students spend for professional courses… more hours to Physical Training course are added, in accordance to the BP… more hours to the course Safe Work Conditions are added,

students study this course every year (personal communication with a HEI instructor, October 10, 2013).

This section has demonstrated that the referentiality approach should not be seen as limited only to the four referentiality mechanisms that have been commonly acknowledged in the literature. The analysis of empirical data from Ukraine has pointed out the existence of another mechanism – reverse reterritorialisation – used mainly by HEI representatives. These actors might use such a mechanism most frequently because they are the ones who apparently are less aware of the essence of all the BP policies than other actors, and thus, have more space for speculation around the correlations among different developments that take place at the same time.

Conclusion

It has been argued in this article that the referentiality approach has scope for further development. An example of the implementation of the Bologna Process in Ukraine has been used to demonstrate three main issues. First, the Ukrainian case has shown that the current application of the approach to the analysis of referentiality mechanisms, used by only national policy makers, should be extended to other actors that participate in the policy implementation process. The evidence has suggested that, besides national policy makers, representatives of national and international organisations that deal with HE in Ukraine, as well as HEI staff members and instructors, use referentiality mechanisms. Second, the Ukrainian example has shown that references are used by multiple actors to not only justify reforms but also to react to them by searching for answers to contradicting issues and ordering uncertainty associated with the BP reforms. Third, the Ukrainian case has suggested that the referentiality approach should not be limited to four referentiality mechanisms. The approach should be viewed as a ground for the exploration of new mechanisms at work in education reformation process. Reverse reterritorialisation was suggested by empirical evidence as an example. The argument which has been developed in this article makes a theoretical contribution to literature on HE reformation by opening up new horizons in the application prospects of the referentiality approach. This will, hopefully, contribute to a wider and richer usage of this theoretical approach to guide further education policy research.

To reflect on the value of the case of the BP implementation in Ukraine for the argument, it should be admitted that the significance of the case cannot be downplayed because HE reform processes in any context are valid for the speculation on the theoretical

boundaries of the referentiality approach. However, the case has only demonstrated that the approach has a scope for further development. Further research is needed to explore whether and how the points used to support this argument are the case in other contexts too. Moreover, the Ukrainian case that helped to put forward the argument about new horizons in the referentiality approach has suggested that the approach can be treated not only as a theory but as a heuristic in future research. New referentiality mechanisms and purposes of their usage should be investigated.

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