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Management of fusions between Romanian universities, a proposed framework

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Abstract

In the current globalised academic world, merger between universities has emerged as a way to increase their competitiveness in the last decades. This paper aims to develop a framework for successfully managing mergers as a way to increase the international competitiveness of Romanian universities. Several cases of mergers between universities around the world were analyzed and presented. Consequently, successful practices of merger actions were detached and interpreted in the context of Romanian universities characteristics. Consequently, we have built a general framework that could facilitate the management of universities fusion in Romanian higher education context. Possible limitations of the study and directions for future research are also discussed and analyzed.

Keywords: mergers, higher education, case studies, Romanian universities, framework.

1. Introduction

Demand for greater efficiency, higher quality and reductions in public budget show that more countries are looking closely at the structure of their higher education systems, and this has often resulted in extensive reforms (e.g.: France, UK etc.). Creating larger units of higher educations institutions represented one of the key actions that governments undertook to achieve the above goals (Curaj, 2015; Harman and Meek, 2002). The main scope of

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creating larger units has resulted in mergers or closures of institutions of higher education all across the world (Curaj, 2015). Mergers started to create changes in higher education systems during the middle of the 1980s until the 1990s. They followed a more general trend of Mergers and Acquisitions, already happening in the business world, beginning with 1980s (ex: Nelson 1956; US News, World Report etc.).

In higher education, the combination of two independent organizations in the form of a merger has occurred both in general and also in specific terms. In general, a merger is defined as any form of organizational combination and it is also a special type of inter-institutional cooperation, characterized by   inseparable entirety. On the other hand, in specific terms, one or two entities will formally fade away and re-emerge as a new entity. The transfer of ownership occurs with general and common possession of the properties of the former organizations. The fundamental aim of the planned merger is to achive a stronger academic potential afforded through the full integration of activities (Curaj, 2015). Investigating mergers in higher education is valuable for improving the general understanding of the phenomenon and also to examine the awareness of the actors about what they have developed theoretically and the applicability of those theories.

The meanings of a voluntary merger happen, when the institutions themselves have initiated the merger, while a forced merger is when the instigator of the merger is external to the institutions. However, it may sometimes be difficult to ascertain whether the merger is voluntary or forced. The voluntary ones are often forced by circumstances. In most countries, mergers have in part been forced, in the sense that educational authorities have initiated them. Authorities have regarded these as a measure to restructure the higher education system. However, authorities in different countries have used different incentives to implement their reforms, and the degree of autonomy for the institutions involved has varied.

A general strategy in most of the voluntary mergers has been the ambition to improve their strategic position in the higher education market (Harman 1986; Hazelkorn 2009; Andreescu et al., 2015). The main intention with state-initiated mergers was to restructure and reorganize part or the whole of higher education system. The main force behind a merger is always some kind of assumed gain. The most frequent reason is the wish to achieve administrative, economic and academic benefits, by merging several small institutions into a larger unit. The idea is that larger units would yield qualitatively stronger academic institutions, better management and use of administrative resources and they would improve the use of physical facilities (Ursin et al., 2010). Administratively, the intention is to achieve economies of scale with regard to the number of administrators, and to get a more professional and efficient administration. And, furthermore, the wish to save money is also an important goal with mergers. Academically, there are at least three main purposes for a merger, such as: first, eliminating duplicative programs; second, increasing academic integration and collaboration and diversifying academic profiles that complement each other, and, third, strengthening the new institution's position in the national and international higher education market. The main strategy was to diversify their programs rather than to eliminate duplicative programs, due to the importance to reinforce their position in the higher education hierarchy in respect to political and to regional markets (Curaj, 2015).

Moreover, one can distinguish between two types of strategies such as bottom-up process and a top-down process or a combination of two. A top-down process is the most common, being used more often and is characterized by a lot of tensions and conflicts among both administrative and academic staff. On the other hand, the bottom-up process, although is less used, is often more smooth and successful (Cartwright and Schoenberg 2006; Mao et al., 2009; Martin and Samels, 1994, 2002). This strategy to create a newly merged institution has a better chance to create consensus among partners and second, it is the best strategy in order to create a common organisational identity among staff members of the new institution. This is because academic and administrative staff are being active participants in the merger process, that motivates them strongly to gain consensus for defining and sharing common future goals of the new institution.

Structural and cultural implications are also important for mergers in higher education (Finance 2015; Georghiou 2015; Hawkins 2015). First, mergers do not appear to be a marriage between equal partners. Many studies have shown that the larger the differences between the involved institutions, the greater the probability that the merger will be unsuccessful. In this respect, the differences are related to institutional size and to the programs that are offered by the institutions involved. Second, geographical proximity has an important role regarding the higher education institutions, which are involved in a merger. International experiences with mergers have shown that the most successful mergers took place between institutions that were geographically not far from each other.

On one hand, important problems appear where there is a large geographical distance between the institutions involved. On the other hand, major problems appeared in situations where there were large cultural and academic differences, too. Another implication would be the clear indications that mergers improve the future position of the new institutions, especially in regard to a larger breadth of different educational programs.

The nature of contradiction between maintaining *status quo* and implementing change is also important in a situation when there are reduced resources. In the case of a merger between private higher education institutions each one of them wants to maintain, as far as possible, their traditional norms and objectives, as well as their own courses and degree programs. In the case of a merger between two public institutions, the tension concerns the wish to meet external political needs versus the desire to maintain traditional academic interests. The implementation of organizational goals often occurs at the cost of individual needs, although most institutions achieve their goals often at the cost of individuals participating in the mergers. The most common example could be the tension between organizations and individuals. People may be negatively affected independent of the type of institutional control or background for the mergers (Curaj et al., 2015).

Mergers between higher education institutions are complex, time-consuming and difficult processes that require intense negotiations and detailed planning (Finance, 2015; Georghiou, 2015; Hawkins, 2015). They should be viewed as a long-term strategy and should be linked to development plans. The status of different departments and academic faculty are often the most difficult obstacles to the process of merger. Leadership, strategic planning and the use of committees whose members are constitutive and emphasis on positive end results, are necessary factors for successful mergers.

Furthermore, results from many studies from different countries indicate that a successful merger is above all characterized by visible and strong management that is able to connect the different sub-cultures, as well as create a joint feeling of identity and organizational structure (Finance, 2015; Hawkins, 2015). This is particularly important in the implementation phase.

Second, it is important to develop goals that are shared by the majority of the staff, so, voluntary mergers will be more successful than forced mergers. Third, access to resources is very important as well as economic flexibility, which is required during the implementation phase. Other important factors for a successful merger are an integrated organizational structure, a well-developed technical network, especially at institutions that are organized as a network organization, and it is also important having a good balance between the different units in the network as a harmonised system.

Relevant international literature of higher education mergers supports recognition of at least three substantive phases of merger: the pre-merger phase; the interim phase; and the post merger phase (Curaj et al., 2015). The process has a change management shape (unfreezing existing organisation-changing it - refreezing the new organisation), as in Kurt Lewin change model.

The merger phases are conceptually important both, for governance and in particular, for institutional governance. Therefore, most important is that this model offers a clear image to the overall shape of the universities merger process which can be instrumental in institutional and joint planning, as well as in communicating a broad understanding of the process to all stakeholders.

2. Analysis of higher education mergers around the world

Given that in recent decades, the major effects of internationalization and globalization are felt more and more in academic system, universities in different countries and even in different continents are in an increasingly competitive environment. These conditions have caused many adaptation strategies, including merger practice. These actions are aimed to increase merger competition potential of a new university by focusing their resources to merging organizations. Thus, we find mergers between universities on all continents and in a wide range of countries from the developing ones to the extreme with advanced education systems, such as England or France.

Despite the context described above, in Romania, the practice of mergers between universities, beyond one example and some attempts (still in the intent period) could be considered as non-existent. The present study aims to develop a theoretical framework that supports and encourages actions towards mergers in the Romanian academic system. To achieve this goal, the study has the following four objectives:

(1) to identify as many cases of mergers between universities around the world

(2) to list a set of current environmental characteristics of the Romanian university system

(3) to identify a set of general characteristics of mergers practices between universities.

(4) to interpret specific merger practices between universities in Romania academic context so that we can propose a theoretical framework to encourage actions towards mergers between universities in Romania.

In order to achieve the planned goals and objectives, this study used the method of documentary analysis. Documentary analysis investigated mainstream research journals, ISI and BDI, and journals published by national publications, and other various sources found free on Internet (official documents from university, articles, newspapers, reviews etc.). The results of these searches and the interpretation that we have given them based on the analysis are presented in the subsections below.

The analysis of international sources allowed us to identifying a number of merger cases between 20 universities, from 4 continents and 10 countries. Table 1 presents a list of the merger actions identified from which we can draw some common characteristics of mergers practices between universities.

Table 1. The list of merger cases in academic environment

The merged universities	The new university formed	The merger year	Countries of origin	Continent
Carson College and Newman College for Women	Carson-Newman University	1889	USA	USA
Southern University (Alabama) and Birmingham College	Birmingham–Southern College	1918	USA	USA
Hawkesbury Agricultural College, Nepean College of Advanced Education and Macarthur Institute of Higher Education	UNIVERSITY OF WESTERN SYDNEY	1989	Australia	Australia
London Guildhall University and University of North London	LONDON METROPOLITAN UNIVERSITY	2000	Great Britain	Europe
University of Exeter, University of Plymouth, Falmouth University Truro & Penwith ,College Cornwall, Peninsula College of Medicine and Dentistry	Combined Universities in Cornwall	2000	Great Britain	Europe
State University Centre Antwerp ,University Faculties Saint Ignatius Antwerp and University Institution Antwerp	University of Antwerp	2003	Belgium	Europe
University of Pretoria, and Mamelodi campus of Vista University	University of Pretoria	2004	South Africa	Africa
University of Durban-Westville (UDW) and the University of Natal	KWAZULU-NATAL UNIVERSITY	2004	South African	Africa
Victoria University of Manchester and the University of Manchester Institute of Science and Technology	UNIVERSITY OF MANCHESTER	2004	Great Britain	Europe
Thames Valley University and Reading College	Thames Valley University	2004	Great Britain	Europe

Rand Afrikaans University, East Rand and Soweto campus of Vista University and Technikon Witwatersrand	University of Johannesburg	2005	South Africa	Africa
University of Port Elizabeth and Port Elizabeth Technikon	Nelson Mandela Metropolitan University	2005	South Africa	Africa
University of East England and University of Essex	University Campus Suffolk	2007	Great Britain	Europe
Engineering Faculty of Mons (FPMs) and the University of Mons-Hainaut.	University of Mons	2007	Belgium	Europe
St Martin's College and Cumbria Institute of Art and University of Central Lancashire	University of Cumbria	2007	Great Britain	Europe
Louis Pasteur, Marc Bloch and Robert Schuman University	University of Strasbourg	2009	France	Europe
Universiteit van Amsterdam and Vrije Universiteit Amsterdam	Amsterdam University College	2009	Nederland	Europe
Helsinki University of Technology the Helsinki School of Economics and the University of Art and Design Helsinki	Aalto University	2010	Finland	Europe
Henri Poincaré, Nancy 2 and Paul Verlaine Universities, and the National Polytechnic Institute of Lorraine	University of Lorraine	2012	France	Europe
Université de Provence Aix-Marseille I, Université de la Méditerranée Aix-Marseille II and Université Paul Cézanne Aix Marseille III	UNIVERSITY OF AIX-MARSEILLES	2012	France	Europe

3. Characteristics of Romania Higher Education system relevant for merger actions

After 1990, the Romanian university system is gradually revived in more directions: specializations abolished or reduced during the old regime are revitalized; is establishing new institutions and university develops the existing ones; private higher education appears as an alternative to the state; increase the number of students in general and each university individually; places are allocated with state-subsidized tuition fee and state universities; increase social and human interest profiles or legal, especially psychology, economics or law; increases the external visibility of the institutions and the number of international collaborations etc.

The first years after the anti-communist revolution are characterized by a very robust growth in the number of higher education institutions, somewhat amid a legal vacuum. Regarding this issue, academia, the university tradition, expresses its concern about the transformation of higher education often times not on mass, but on poor "to trivialize academic professions, and dozens of young people are misled by companies that say university but behind that is only, at best, a school more relaxed" (Marga, 2005, p. 207). It is clear that the higher education system in Romania has grown oversized during that period, given that "our country has more universities than Germany, Italy, England, which is obviously unrealistic" (Marga, 2005, p.207).

Even if the Romanian higher education system has developed, and the number and diversity of institutions grew gradually covering the entire country (almost no major city that does not have a university institution, public or private), four major universities dominated permanent and even today dominates the system, concentrating mostly academic population: Iași, Bucharest, Cluj-Napoca and Timisoara. From another point of view it seems that the quality of education in these centres is relatively higher than in the middle. In support of this assertion we believe it is sufficient to note only that in various rankings of Romanian universities, the four university centres top 10 places in eight universities (for each centre two both polytechnic and university Classic - according Leader board Ad-Astra

Universities in Romania, 2007 edition - www.ad-astra.ro).

The late of twentieth century and early twenty-first century encounters an European university really willing to create a common academic framework with the intention of forming a "knowledge society", capable of real competition environment for North American and Japanese. Under the European Union, but enrolling and countries beyond, the academic and social goal is planned and implemented by what came to be called the "Bologna Process" and had become "by its scope and objectives the most important process transformation ever known by the European university systems" (Comșa et al. 2007, p. 46).

Starting from Bologna in 1999, European education ministers meet every two years (Prague - 2001, Berlin - 2003 Bergen - 2005, London - 2007) to discuss current issues and future of European higher education and to monitor progress in the ten directions of the proposed development of the "Bologna Process" (adopted as follows 1-6 at Bologna in 1999, 7-9 in Prague in 2001, 10 in Berlin in 2003):

1. to adopt a compatible system of degrees;
2. to adopt a system of higher education in three cycles: Bachelor (3 years), Master (2 years) and PhD (3 years);
3. to establish a system of Credit Transfer at European level;
4. to promote the mobility of students and teachers;
5. to promote European cooperation in the quality assurance;
6. to promote the European dimension of higher education;
7. to promote lifelong learning;
8. to promote students and higher education institutions;
9. to promote the attractiveness of European Higher Education Area (EHEA)
10. to promote Doctoral studies and the synergy between EHEA and ERA (European Research Area).

The EUA reports are prepared based on information gathered from universities through research tools, places Romania on the position of the European average in all ten courses of action, less in terms of international orientation.

Currently, the higher education system in Romania has the following structure, all institutions adopting the provisions of the "Bologna process" of education conducted in three cycles 3 + 2 + 3 years (of course, depending on your specialization): 56 educational institutions state accredited higher (49 civilian and military 7); 29 accredited private higher education institutions; 28 private higher education institutions accredited provisional authorization; Six graduate school (Dumitru et al., 2007, p. 5).

A large study on Higher Educational Romanian System (HERS) starting from diachronic analysis of system evolution and implement an extensive empirical research to analyze organizational culture of Romanian universities (Ilie, 2008) highlighted an interesting set of conclusions. Of these we manifest below those that may be interesting in terms of opportunities for merger analysis Romanian universities:

- ✓ poor international visibility of most Romanian universities;
- ✓ low level of scientific production regarding its European level (Dragoș, and Cute, 2007, p. 130-133);
- ✓ appropriate knowledge and understanding of all the Bologna Process, leading to their arbitrary application, such as transferable credits;
- ✓ relatively low level of international partnerships and mobility of teachers and students (with the exception of poles of strength consisting of large universities);
- ✓ relatively low, or even no correlation between own academic research and its results on the one hand and writing / presenting courses and university seminars on the other hand;
- ✓ poor pedagogical training of university teachers (if there is a model of pre-university training in this sense, for academics there is not such a program);
- ✓ Low funding and financing based on quantity not on quality, as in the case of financing based on the number of students;
- ✓ minimization of quality assessment processes (although formally legislation and tools to control and quality assurance exist, their application is often only formal and limited to reporting);
- ✓ there is a large number of universities compared to national potential compared to more developed European countries such as Italy, England and Germany;

- ✓ the percentage of students per 1000 inhabitants is still below the European Union (paradoxically, by reference to the item above);
- ✓ lowered prestige regarding the teaching profession; in this respect, a study of the Romanian Government places the teaching option in 5th place in the hierarchy of professions desired by students with very small percentage of 6.9% for students in the state system and 4, 7% for students in the private sector (GRASG, 2008, p. 14);
- ✓ academic performance culture reveals that the central idea of university performance is understood as represented by the material facilities of a university and not as performance in research and / or teaching.
- ✓ organizational changes made in HERS had rather external and vertical top-down implementation by requiring those in leadership institutions.

4. A possible set of useful conclusions drawn from the studies cases

A systemic analysis of the six merger cases between universities (London Metropolitan University, University of Kwazulu-Natal University, University of Manchester, University of Aix-Marseilles, University of Western Sydney and Birmingham–Southern College) allowed us to identify the next set of conclusions:

- ✓ the success of a merger between the universities is determined by a well-established plan.
- ✓ the merger plan must respect the phases of merger process in academic environment.
- ✓ the merger plan must have a high level of flexibility, allowing operational adjustments, however, remain on the required direction of merger activity philosophy and its strategic objectives.
- ✓ the merger process is a long term one.
- ✓ the merger plan development must be based on solid opportunity studies.
- ✓ beyond the objectives and economic motivation of a merger approach between universities, merger processes that have proven effective focused on objectives based on increasing academic performance in curricular innovation, increased investment in research and joint efforts to link teaching and research.
- ✓ the merger processes that have proved effective have resulted in universities from the same area, in most cases the same city.
- ✓ generally a merger implies two universities, but there are cases where three or more universities have merged successfully.
- ✓ a successful track record of bilateral cooperation between universities that are aiming to merge is a good prerequisite for the success of the merger.
- ✓ preparing the proper merger action through a consortium representing an organisational structure easing the universities to collaborate and to make joint strategic decisions has proved a successful practice.
- ✓ in situations where there was a legal, logistical and financial support from state authorities in implementing the plan of merger, the merger success was faster.
- ✓ the involvement of external people, in business, in leadership and management of the merger process can be extremely effective on medium and long term, by ensuring that activities are in the real objective direction of the merger.
- ✓ it is very important that no matter the size of the merging partners, idea, philosophy and objectives of the merger to be accepted by all parties, and the process itself is seen as an opportunity.
- ✓ key people (managers, members of the merger coordinating team, change agents) in implementing the merger should be selected according to the level of competence and not based on an algorithm of distribution fairly between merger partners.
- ✓ open communication and explanation of merger decisions and actions related to academic staff but also to management is extremely important prerequisite for the success of the merger.
- ✓ Building and exploitation the strengths of all partners during the merger process is also a successful practice.
- ✓ finding real and valid historical arguments for sustaining the merger process is always welcomed.
- ✓ the merger must allow academic and administrative departments regrouping and also eliminating overlapping and duplication of departments, academic programs and resources.

✓ the main administrative entity will become the newly created university, which should unify all similar departments from all merger partners.

✓ one of the most important problems of an academic merger process is merging similar departments in order to unifying them.

✓ the compatibility of procedures of management and administration softwares of merging universities must be solved during the first phase of the merger process.

5. Conclusions: A possible framework for mergers of Romanian universities

Based on the analysis of *Romanian Higher Education System (*RHES) particularities and on the conclusions drawn from the successful merger cases presented, in order to develop a tentative framework for academic merger actions in Romania, we are proposing the next logical scheme.

The first step of the process should be to create the specific and necessary legislation framework. These must capitalize the following five aspects: university funding depending on their national and international impact; allocation of national and regional strategic roles; imposing a minimal level of performance and international visibility for funding and accreditation; complementarily of research and teaching activities; financial support for the merger process through national grants.

Step number two, should be an Analysis of merger opportunities in the Romanian Higher education system, based on strong empirical research. We recommend strongly including also an analysis of stakeholders' needs and wants. We consider that they should include the following categories: the ministry of education, the universities managers (rector and senate leader), the academics, the administrative staff, students, local and regional authorities, employers associations, and citizens. It is obvious a huge task, therefore we suggest to focus on the important stakeholders according to Mitchell Agle Wood stakeholder model, with its three dimensions: power, legitimacy and emergency. The result of this step will be to establish a list of possible successful mergers aiming to create stronger universities as size and impact, better quality teaching and research, increased economic and social efficiency through reducing costs, and using synergies between merged universities.

The next step, will focus on creating an university consortium, based on the existing and improved legal framework for managing the strategic aspects for universities that will merge, having as main tasks to lay the ground for the idea, its philosophy and the merger plan.

The fourth step, we recommend to hire external experts to be part of the merger implementation plan. It is a very technical step, justified by the lack of academic mergers experience and knowhow in RHES that we have identified for this period. It is based on the best practice of business mergers, where the role played by specialized consultants in supporting the whole merger process is decisive for the planning, organizing and implementing the merger plan.

The next step, the fifth, is about Preparing the merger implementation plan based on economic, historic and educational arguments, the SWOT analysis developed during step two. The outcome of this step will be an action plan (activities, resources, timing, responsibilities) discussed, changed according to the needs of all stakeholders, agreed and formally approved by the members of the consortium,

The next step is about implementing step by step the agreed merger plan through: system and software compatibility of management and administration; sustaining the idea of merger as an opportunity; regrouping departments in faculties to avoid duplication of resources; merging of similar departments based mainly on their international performance. Implementing the merger plan is the decisive phase when neglecting the interests of relevant stakeholders is usually leading to increased resistance to change, beginning with opposing the execution of the plan, voicing and even acting against, leading to non-achievement of the planned performance parameters.

Step 7 should be controlling the execution of the implementation plan, evaluating intermediary results, taking appropriate action to facilitate and allow for the merger to develop smoothly. A collaborative manner of implementing the change brought by the merger process should be adopted by the merger coordinating team, and strongly supported by the rectors and senate presidents of the universities involved.

The proposed framework is an outline for a plan that could lead and facilitate merger actions in RHES, an outline which needs to be more detailed in order to be improved. We consider that, given the lack of practices of academic mergers from RHES and the systems particularities, without legal motive and imposing top-down desire to

increase academic performance, merger activities between universities in Romania will be delayed in the absence of legal incentives and motives and without a top-down approach from the Romania ministry of education, with the strong backing of the government and Parliament..

Beyond these issues, within the limits of the study we point out that the proposed framework for facilitating the mergers between Romanian universities has only theoretical support, and not also empirical, not being tested and / or piloted in practice, at this stage of our research.

Of course, further research could test the model or rather part of it, then providing statistical data to support or not the theoretical proposal. From another point of view, the study has a sufficient number of cases in order to support the claim of some conclusion that can be generalized. On the other hand, it does not present any case from a country with a history similar to our country such as the former communist countries. We could not find such cases, though, definitely in terms of a framework for merger actions in Romania, they would be interesting. So, the expansion of further research in this direction is a welcome recommendation in order to accomplish the stated purpose of the study. In our opinion, merging academic institution is a particular situation of the practice of mergers between other types of public institutions, such as ministeries, and there is some practice in this field also in Romania. On the other hand, there is a large body of knowledge about mergers between businesses, with a clear difference of motives, value creation, and ways of doing it. At this moment, we have identified that the main reason for a successful or unsuccessful merger in the business world is related to focusing only on technical aspects of the mergers, being them financial, legal, operational, product and service related, and neglected to a large extent the human side of the process, the people of the merging organizations.

That is why we have included in the proposed framework for academic mergers the stakeholders analysis and the principle of participative involvement of academic and administrative staff, employees of the organizations, and students, as customers of educational services provided by the universities. We recommend active involvement and direct participations of academics, students and administrative staff in the mergers process from its beginning.

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