

Management Strategies in the Study of Higher Education Mergers. A Literature Review

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Abstract. *In the current international context, in which university mergers have gained high importance not only for higher education institutions, but also for state and governmental policy makers, the need for an analytical approach has become more important than ever. The goal of the present study is to review the existing literature on higher education mergers, analyzing their national system outcomes, the results and lessons from which other countries may benefit, as well as the research methods used to evaluate the success of failure of university mergers. With this study and the ones that follow, we want to build a knowledge base in order to serve other higher education merger initiatives, in a world where this phenomenon will become more and more a necessity. By analyzing the specialized literature on higher education mergers in Europe but also on other continents, with an extend on the first university mergers in Romania, this study represents a synthetic approach of the main theoretical aspects, objectives, process specifications and results analyzed and compared in previous theoretical studies. The paper focusses on international information, such as empirical research, national policies, laws and conceptual frameworks, to highlight most important themes and perspectives in this domain. Following and analyzing the existing research on the subject, this paper aims to contribute in developing a systematic understanding of the reasons, objectives and outcomes mergers in higher education have, considering also their limitations and potential benefits on the entire international higher education paradigm. The conclusions show the gaps in the existing literature and the need for further investigation and analysis, as well as the need of higher education initiatives to adapt to the context, benefiting from the proven results of other similar initiatives.*

Keywords: Higher education mergers, Institutional consolidation, Higher education systems, Merger outcomes, Literature review.

Introduction

At present, higher education institutions are struggling with pressure due to demographic changes, globalization, internationalization, public policies constantly changing and the need to be more competitive in this unstable social, political and economic context. In order to achieve

sustainability and remain competitive, universities are obliged to adopt strategies borrowed from the business environment, among which mergers have become a necessity. These institutional consolidations should reduce costs, diversify academic and research activities, increase international brand awareness and provide better access to new founding sources, resources and technologies. The literature shows that mergers determine profound changes for the entire structure of the organization, which may include hierarchy changes, reconfiguration of curricula, as well as the integration of management strategies and university missions. These processes make a substantial impact on human, financial, and technological resources. This means that the drivers, as well as the objective of the mergers are extremely important, considering the need to prioritize the academic integrity, from both educational and research perspectives, with a main focus on the reputation of the institution as well as its academic quality standards and financial aspects.

Methodology

This paper aims to identify, by analyzing the existing literature, the main drivers, process specifications, results and challenges of higher education mergers with a focus on best practices and lessons learned that can benefit stakeholders of future initiatives in this field. The literature analyzed was selected from international academic databases, such as Scopus, Web of Science and Google Scholar. We also added national reports, policies, institutional internal publications, laws and case studies. Search terms included “higher education mergers,” “university consolidation,” “institutional merger,” “research institution merger,” and other related keywords. The review focused on publications from the last decades, without excluding older studies relevant in global contexts, including Europe, the United States, Russia, France and Romania, to enhance both historical and present relevant case studies. We focused on studies that consisted in detailed case study analysis relevant to the management of mergers in higher education and research institutions. We excluded studies unrelated to the theme or without methodological details or relevant conclusions.

Literature review

Higher Education Mergers in a Diachronic Perspective

Over the past decades, higher education institutions have been compelled to adopt concepts and practices traditionally associated with the business sector in order to be competitive and create for themselves a strong position in the region (Hemsley-Brown & Oplatka, 2006). If in the private sector mergers mainly function as instruments for control of the market and competition elimination, in this field, mergers function as mechanisms for increasing efficiency and are typically enacted through legislative measures or governmental acts.

This trend was identified in 1972 by Professor A. R. Krachenberg of Ohio University. In his seminal article “Bringing the Concepts of Marketing to Higher Education”, Krachenberg underlined the need for a managerial revolution within higher education. After a long period with administrative stability and adherence to the status quo, higher education institutions began to incorporate management techniques from both the business and governmental sectors to adapt to changing societal and market conditions (Krachenberg, 1972).

The oldest cases of higher education mergers documented in the studied literature go back to the 1930s in North America; however, systematic merger activity did not emerge until the 1970s. According to Millett, by the early 1970’s enrollment in the United States was distributed approximately 75/25 between public and independent institutions (Millett, 1976). This imbalance

was interpreted as an indicator of potential financial instability within the independent sector and mergers among independent colleges were promoted as a means of strengthening the sector and improving its competitive position relative to public institutions.

In the same time, European higher education systems went through structural challenges that required reformation. In the UK, for example, traditional universities were already unable to meet growing societal demands for vocational education (Kyvik, 2004). In response, the government went to initiate mergers among smaller specialized institutions, leading to the creation of polytechnics that functioned as an alternative educational sector. These mergers initiated the development of new academic programs, improved quality standards and generated economies of scale. Similar dual-system approaches were adopted across Europe, including in Belgium, Germany, Norway, Sweden, Finland, and the Netherlands, where mergers were used to establish larger, multi-disciplinary colleges capable of offering a wider range of programs in order to operating more efficiently (Kyvik, 2004).

A decade later, between 1981 and 1983, Australian higher education experienced a significant wave of mergers, driven by federal government policies aimed at cost reduction and addressing declining enrollments in certain disciplines and institutions (Harman, 1986).

In Europe, France represents a prominent example of a nationally driven centralization policy. Between 2009 and 2017 nineteen universities and one national polytechnic institute merged, meaning over 20% of the universities existing in 2008 and resulting in a net reduction of eleven institutions (IGAE, 2019).

In recent decades, higher education reforms in Russia were driven by government policies wanting to enhance the economic efficiency of public universities by fostering competition and promoting financial autonomy, supporting the creation of world-class universities, and establishing institutional quality assurance mechanisms. The authors examining developments in Russian higher education identify several persistent challenges, including the mismatch between graduates' skills and the actual needs of employers, difficulties related to international university rankings, the need to improve the overall quality of higher education, insufficient financial support for universities, the limited practical relevance of academic research conducted by teaching staff, and the lack of study programs delivered in English. These issues are widely viewed as the main challenges of Russian higher education. While some of these concerns are mainly international, such as relevance, quality, economic contribution, and internationalization, which will be discussed further, research indicates that, despite similarities in reform objectives, policy implementation varies significantly across countries with different systems of governance (Forrat, 2012).

In Romania, university mergers are a relatively recent phenomenon, initially facing legislative challenges (Curaj, A., Georgiou, L., Cassingena Harper J., Egrou-Polak, E., 2015). The first major merger happened in 2011 between the Technical University of Cluj-Napoca and the University of North in Baia Mare, combining technical and humanities profiles into a single institution with 12 faculties. In the next years several regional universities were absorbed by larger institutions, culminating in 2023 with the merger of Politehnica University of Bucharest with the University of Pitesti, established by Law no. 186/2023. This merger made Politehnica one of the largest universities in Central and Eastern Europe and created a model for a new paradigm in Romanian education system.

Although the topic has gained increasing attention, we believe that it remains underexplored. One of the most recent contributions, published in *Tertiary Education and Management* in October 2023 (Caetano da Silva et al, 2023) suggests that mergers and acquisitions can positively influence educational quality, although this relationship is highly sensitive to

institutional incentives. When such incentives fail to promote continuous improvement and high standards, mergers may negatively affect educational quality. As a result, universities worldwide are under great pressure to invest in well-structured and visionary strategies, with mergers and acquisitions perceived as opportunities for expansion and synergy.

Results and discussions

Higher Education Mergers. A systematic review

Based on the systematic analysis of literature, higher education mergers can be grouped into several distinct phases, each characterized by specific drivers, objectives, and institutional dynamics (Table 1).

Table 1. Phases of Higher Education Mergers: Key Characteristics Identified in the Literature

Period / Phase	Main Drivers	Key Objectives	Typical Characteristics	Representative Contexts
1960s–1980s <i>Structural consolidation</i>	Higher education expansion due to state-led reforms	Administrative simplification	Focus on size and coverage	Western Europe; early system-level reforms
1990s <i>Efficiency-oriented mergers</i>				
2000–2010 <i>Competitiveness and rankings</i>	Budget constraints; demographic decline	Cost reduction; resource optimization; duplicate elimination	Emphasis on economies of scale; managerial integration; performance indicators	Europe (Nordic countries, UK); post-socialist transitions
2010–2020 <i>Strategic and research-oriented mergers</i>				
2020–present <i>Digitalization and AI-driven integration</i>	Globalization, international rankings	Improved research output, international visibility, academic prestige	Creation of comprehensive universities; research-driven consolidation	France, Germany, China, United States
	Excellence initiatives, innovation policies, regional development	Research concentration, interdisciplinary centers, governance reform	Complex governance models, cultural integration challenges, long-term strategies	France (IDEX), Russia, Central and Eastern Europe
	Digital transformation; AI adoption; post-pandemic restructuring	Organizational resilience; smart governance; data-driven decision-making	Integration of digital systems; AI-supported management; hybrid institutional models	Emerging globally, including early cases in Romania

Source: Authors' own research.

Mergers and acquisitions can create academic integration, collaboration, and program diversification, mainly when the institutions involved are of different sizes and type. Smaller institutions can benefit from the reputation of bigger ones, from improved access to qualified academic staff and increased program flexibility, especially in resource-intensive fields such as engineering and medicine. Additionally, mergers often lead to more professional and efficient administrative structures and, over time, can generate economies of scale through resource rationalization and infrastructure optimization.

Most authors consider that administrative, economic, and academic benefits constitute the most important and common objective of mergers (Skodvin, 1999). Larger institutional size is generally associated with advantages such as economies of scale, administrative professionalization, elimination of program duplication and enhanced interdisciplinary collaboration. Mergers between institutions with distinct academic profiles can also diversify the mission of the new entity and strengthen its national and international position. Rocha et al. (2018) identify cost efficiency, economies of scale and scope and reputational enhancement as the most important drivers of mergers. They also categorize merger motivations into economic survival, competitive positioning, quality improvement and system consolidation.

Van der Wende (2014) highlights additional drivers, including global competition, international rankings, national policies for excellence and changes in higher education and research funding processes and conditions. These factors encourage institutions to expand their scope and scale in order to improve efficiency and thrive for a better position, hence a more visible and stable brand.

Figure 1 highlights the main factors driving institutional mergers. These include strategic growth, resource optimization and the expansion of academic programs, in order for universities to strengthen their regional and international presence.

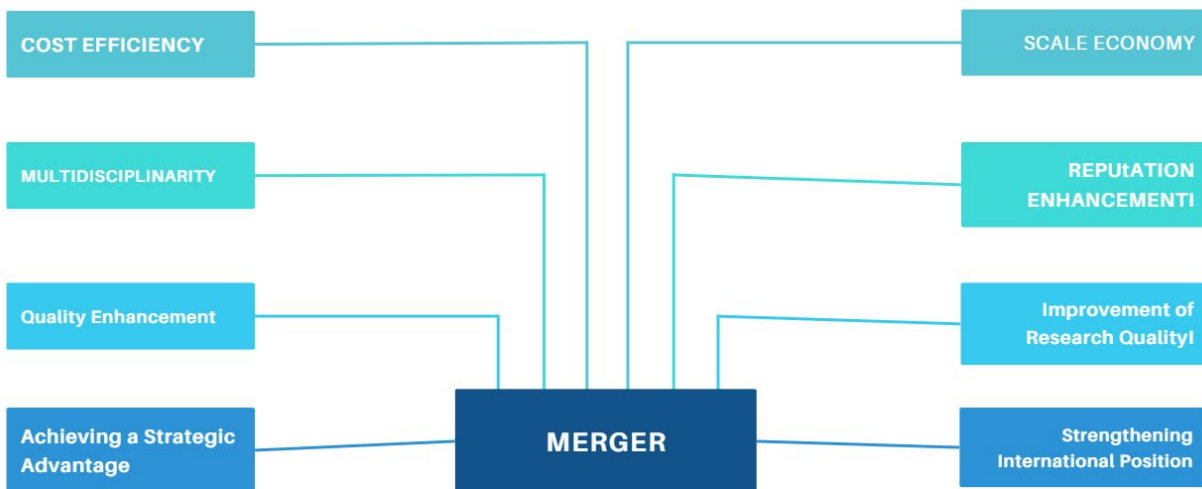


Figure 1. Main factors driving institutional mergers

Source: Authors' own research.

The literature categorizes mergers in voluntary and involuntary (policy-induced). Voluntary mergers, initiated by the institutions themselves, are generally considered easier to implement and more successful due to higher staff engagement (Harman & Harman, 2003). In contrast, involuntary mergers (or, as some called them, forced mergers) are typically driven by governmental pressures and policy objectives, often implemented through performance-based funding mechanisms. While such mergers are sometimes justified as system-rationalization measures, recent research suggests that they are increasingly motivated by ambitions to create world-class universities and enhance international prestige (Goedegebuure, 2012). Also, studies (Schönreiter, I. M., 2018) distinguish between university merger processes by the relative size and institutional profiles of the entities involved. Mergers between institutions of comparable scale are named horizontal mergers. These typically involve complex integration challenges, particularly regarding the alignment of institutional brands, resources, and governance structures, and are often

highly resource-intensive. Such mergers happened in countries like France, where recent consolidation efforts have largely occurred among similarly sized universities. In contrast, vertical mergers involve the integration of a significantly smaller, often specialized institution into a larger university. In these cases, the dominant institution's identity and brand are generally preserved, while the smaller entity is absorbed as a constituent unit. The University of Tallinn provides a notable example, having incorporated multiple specialized institutions since 2005. Vertical mergers are therefore frequently described in literature as absorptive processes. Beyond institutional size, mergers also differ according to the degree of similarity or complementarity between the academic profiles and statuses of the institutions involved. Mergers between highly complementary institutions, particularly where program overlaps are limited, tend to have a lower impact on staff restructuring. Institutional combinations also directly influence branding identity and marketing positioning, making institutional compatibility a very important dimension in the analysis of university mergers. University collaboration and consolidation processes also vary according to the depth of institutional integration. Instead of full legal mergers, institutions may choose comprehensive integration models in which they retain separate legal identities while operating under a shared governance structure, such as federations. These arrangements are typically driven by strategic management objectives or resource-sharing considerations and often have a geographical dimension.

Finally, institutional theory provides a useful lens for understanding the widespread adoption of mergers in higher education. According to DiMaggio and Powell (1984), organizations operating within the same institutional field tend to become increasingly similar, adopting strategies perceived as successful. Thus, mergers can be viewed as part of a broader trend toward organizational isomorphism in global higher education systems.

Overall, despite variations in classification and emphasis, literature consistently identifies economies of scale, quality enhancement, diversification and reputational gains as main drivers for higher education mergers. While much of the existing research relies on national case studies, their synthesis offers valuable insights into the drivers, processes, and outcomes of mergers across different contexts.

Research Approaches and Methods in the Study of University Mergers

Research on higher education mergers combines case studies, comparative analyses (interviews, observations, document analysis) and quantitative methods based on statistical data and impact indicators to provide a multidimensional understanding of this complex phenomenon. While case studies detail processes and outcomes, comparative and quantitative approaches reveal patterns and impacts. Qualitative research usually highlights stakeholder perspectives. Future research could further explore the effects on education quality, student experience, governance, and the influence of cultural and economic contexts.

Comparative Perspectives on Higher Education Mergers in France and Russia

The university mergers in France represent a very interesting study case in this field of research. Although these mergers were not directly determined by the national policies, they were indirectly determined in a state-supported framework being strongly shaped by post-2010 governmental incentives, particularly the "Investments for the Future" program, aimed at strengthening governance, competitiveness, research excellence, administrative efficiency and international visibility through complex and carefully managed restructuring processes.

The joint report published in March 2019 by the French ministries responsible for education and higher education, Ministère de l'Éducation nationale et de la Jeunesse and Ministère de l'Enseignement supérieur, de la Recherche et de l'Innovation, through the Inspection générale de l'administration de l'éducation nationale et de la recherche, entitled *Premier bilan des fusions d'universités réalisées entre 2009 et 2017*, provides an very vast report of the impact of university mergers in France on the quality and relevance of higher education. The findings indicate several positive results, including increased international visibility of institutions, improved performance in research and innovation, diversification of educational offerings and the strengthening of partnerships with industry. However, the report also emphasizes that university mergers represent a long-term process, taking about 10 to 15 years to complete, with many of their benefits becoming fully observable only over time. Overall, university mergers in France have constituted a significant step in reshaping the national higher education landscape and a strong example for other countries. Nevertheless, continuous monitoring and careful impact evaluation remain essential to ensure that the initial objectives are achieved and that the quality and relevance of the institutions remain central priorities. Furthermore, these experiences offer valuable opportunities for international comparison, collaboration, and knowledge exchange with other countries pursuing higher education reforms.

The report examines three main dimensions: teaching and research activities within the merged universities the new governance, institutional structure, and organization and the administrative structure and management arrangements. Its main purpose is to identify the key factors shaping the “critical path” of merger projects, to highlight common and differentiating elements, and to assess their impact on achieving institutional goals. The methodology is based on questionnaires and interviews conducted with a representative sample of university leaders involved in merger processes, as well as senior officials from public regulatory and higher education agencies involved in the merger process. All mergers are embedded in a solid strategic framework, articulated through a founding document that either constitutes or evolves into the institutional project, supports contractual relations with the state and reflects a genuine commitment to integration and a shared vision.

The analysis is based on a set of indicators including graduation exam success rates, institutional rankings, the number of published articles, doctoral theses defended, submitted and approved research projects and investment projects. Overall, the implementation of university mergers in France is described as a complex, multi-stage process, in which financial resources, infrastructure, human capital and governance arrangements must be carefully managed in order to ensure successful results and minimize potential negative effects.

On the other hand, in Russia, university mergers have been a major reform instrument in higher education, initially driven by the state to eliminate financial and academic inefficiency and improve quality and later continued voluntarily by universities to strengthen regional institutions and increase competitiveness. Government policies wanted to increase the economic efficiency of public universities by promoting competition, financial autonomy, creating world-class universities and establishing strong quality assurance mechanisms. Researchers of Russian higher education highlight key challenges such as the mismatch between graduates' skills and labor market needs, weak positions in international rankings, limited practical relevance of academic research, insufficient funding and the lack of programs in other languages, such as English. While some policy issues are naturally of global importance, similar reform objectives tend to produce different outcomes across countries due to variations in governance and national specifics (Forrat, 2012). Following the collapse of the Soviet Union, the Russian higher education system experienced rapid

and largely unregulated expansion, with the number of institutions doubling by 2010 due to increasing number of private providers and regional branches, often of questionable quality. In response, the government launched consolidation policies after 2015, closing inefficient institutions and promoting mergers to reduce fragmentation, improve quality and address demographic decline, while simultaneously supporting the development of leading universities as drivers of innovation and competitiveness. After restructuring, Russia's leading university system included 2 national universities, 10 federal universities, 29 national research universities and 33 elite regional universities, serving national, regional, and local objectives; notably, all federal universities and several elite regional universities were created through mergers. Although research on the outcomes of Russian university mergers remains limited, available evidence suggests that institutions involved in mergers have improved their efficiency compared to the pre-merger period (Zinkovsky & Derkachev, 2016). The article *Restructuring the System of Higher Education* by K.V. Zinkovsky and P.V. Derkachev examines the impact of mergers, acquisitions, and organizational restructuring on the performance of Russian universities. Using a sample of 132 institutions affiliated with the Ministry of Education and Science, the study employs Data Envelopment Analysis (DEA) to evaluate both educational and research efficiency, presenting two models for performance assessment. Universities were analyzed according to restructuring characteristics, including the frequency of unit consolidations or eliminations, restructuring period, mechanism type, and inclusion of technical colleges. Nonparametric statistical methods were used to compare performance across groups, accounting for non-normal distributions and small sample sizes. The findings indicate that universities actively participating in restructuring improved performance relative to others. No temporary decline followed by recovery was observed for institutions undergoing mergers or acquisitions and absorbing technical colleges did not reduce performance. By 2015, universities had narrowed the performance gap with leading competitors compared to 2010. The study demonstrates that restructuring can enhance institutional efficiency and competitiveness, challenging common assumptions about temporary performance declines. Its use of DEA and longitudinal statistical analysis provides robust empirical evidence, offering valuable insights for policymakers and higher education leaders regarding the outcomes of mergers, acquisitions and organizational restructuring.

An alternative perspective in the literature on university mergers in Russia focuses on their impact on students, a perspective rarely seen in research focusing on other countries. Existing studies identify the most significant and sensitive changes in student experience during and after mergers, including organizational structures, educational processes, university culture, and institutional status and reputation (Bennetot Pruvot, Estermann, & Mason, 2015).

Students most frequently reported changes in infrastructure, accommodation and teaching staff as key challenges. Another major issue concerned increased academic requirements, such as higher standards for examinations and thesis defenses at the newly merged institutions. These changes were interpreted either as legitimate consequences of joining a more prestigious university or as discriminatory practices by faculty from the partner institution. Respondents did not mention substantial changes in curriculum content or the acquisition of new knowledge and skills.

Difficulties in communication with students, faculty and administrative staff were also highlighted, largely due to cultural and institutional differences. These issues were particularly evident when students from the smaller institutions entered large, more bureaucratic universities, when professionally oriented institutions merged with research universities, or when students with strong but differing academic identities were brought together.

Student perceptions were dominated by concerns related to institutional brand, status, reputation and the perceived value of the degree student. Reactions were asymmetric: students from lower-status universities viewed mergers as beneficial and quickly adopted the new institutional identity, while students from higher-status universities perceived mergers as unfair and diminishing their academic identity.

We consider that the student perspective is very low represented in the literature reviewed in this paper and we aim to fill that gap by future research conducted by present authors.

Romania: Laying the Groundwork for a Paradigm Shift

In Romania, university mergers represent a relatively recent and still evolving phenomenon. Early merger initiatives appeared following the 2011 education law, but many initiatives were hindered by unclear legislative provisions. The first major public–public merger occurred in 2011 between the Technical University of Cluj-Napoca and the University of the North in Baia Mare, marking Romania’s first merger between a technical and a humanities-oriented institution. This was followed by a limited number of absorptions involving smaller regional universities, such as the integration of the University of Reșița into Babeș-Bolyai University in 2020.

A major turning point occurred in 2023 with the merger between Politehnica University of Bucharest and the University of Pitești, established by Law no. 186/2023, creating the National University of Science and Technology POLITEHNICA Bucharest. The merger expanded the university’s academic profile through the incorporation of the Pitești University Center, adding multiple non-engineering faculties and a non-university tertiary college. Conceived as part of a broader strategy to build a national university of science and technology, the merger aimed to create a unified academic and research community with regional and national impact. With a large and diversified academic portfolio, extensive research infrastructure, and strong industry partnerships, POLITEHNICA Bucharest has positioned itself as a modern, comprehensive institution aligned with European priorities such as interdisciplinarity, internationalization and resource sharing. In a context of demographic decline and increasing global competition, this merger signals the early emergence of a new paradigm in Romanian higher education, centered on large, multidisciplinary regional universities with enhanced international visibility and strategic development capacity (Șerban, D.M., Semenescu, A., Ciuchi, O., Șerban, N, 2025).

Conclusion

Our paper synthesizes and examines existing research on university mergers and organizational restructuring, with a particular focus on research methods and performance. A recurring pattern in the studies dedicated to higher education mergers is the finding that university mergers, when actively managed, do not lead to systematic declines in institutional performance. Also, the literature diverges in its assessment of short-term effects, stakeholder experiences, and success criteria, reflecting differences in methodological approaches and regional contexts. Empirical studies, particularly those employing Data Envelopment Analysis (DEA), frequently report stable or improved performance among institutions actively engaged in restructuring processes. These findings are especially prominent in state-driven reform contexts, where mergers are embedded within broader policy frameworks aimed at enhancing efficiency, competitiveness, and international visibility.

Comparative analysis further indicates that the results of university mergers are very dependent on the context. While Western European systems focus on institutional autonomy and strategic alliances, research from post-socialist countries highlights centralized governance and

policy-induced consolidation. In this context, Romania remains underrepresented in the international literature, despite recent large-scale mergers that signal a potential shift toward multidisciplinary regional universities.

We consider that the reviewed literature shows notable methodological and conceptual limitations. Most studies rely on institutional indicators, focusing primarily on research output and educational efficiency, while disregarding stakeholder-level perspectives such as those of students and academic staff. Qualitative aspects, including organizational culture, identity transformation, and perceived legitimacy are not integrated into dominant analytical models. This imbalance constrains a comprehensive understanding of the long-term consequences of mergers.

Building on these insights, future research will focus on the merger of Politehnica University of Bucharest with the University of Pitesti in Romania, employing surveys and interviews with students, staff, and key stakeholders. This methodology will enable a more holistic assessment of merger impacts, capturing both institutional performance and stakeholder experience and aligning findings with the stages of institutional development. By integrating quantitative and qualitative perspectives, future papers will address gaps identified in the current literature and generate practical recommendations for effectively managing university mergers.

Acknowledgements

During the preparation of this work, the author(s) utilized ChatGPT 4 to enhance readability and language clarity. Following the use of this tool, the authors meticulously reviewed and revised the content as necessary and assume full responsibility for the final content of the publication.

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