

EUA BRIEFING

University Mergers in Europe

April 2019



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In 2015, the European University Association (EUA) launched the University Merger Tool to map institutional mergers and clustering in the European higher education sector, starting from the year 2000.

In this context, a **merger** is defined as having taken place when one or more institutions are incorporated into either a new or an existing institution and cease to exist as a legal entity as a result of this process. The University Merger Tool also maps hybrid cases in which umbrella organisations are established in the wider context of system restructuring.

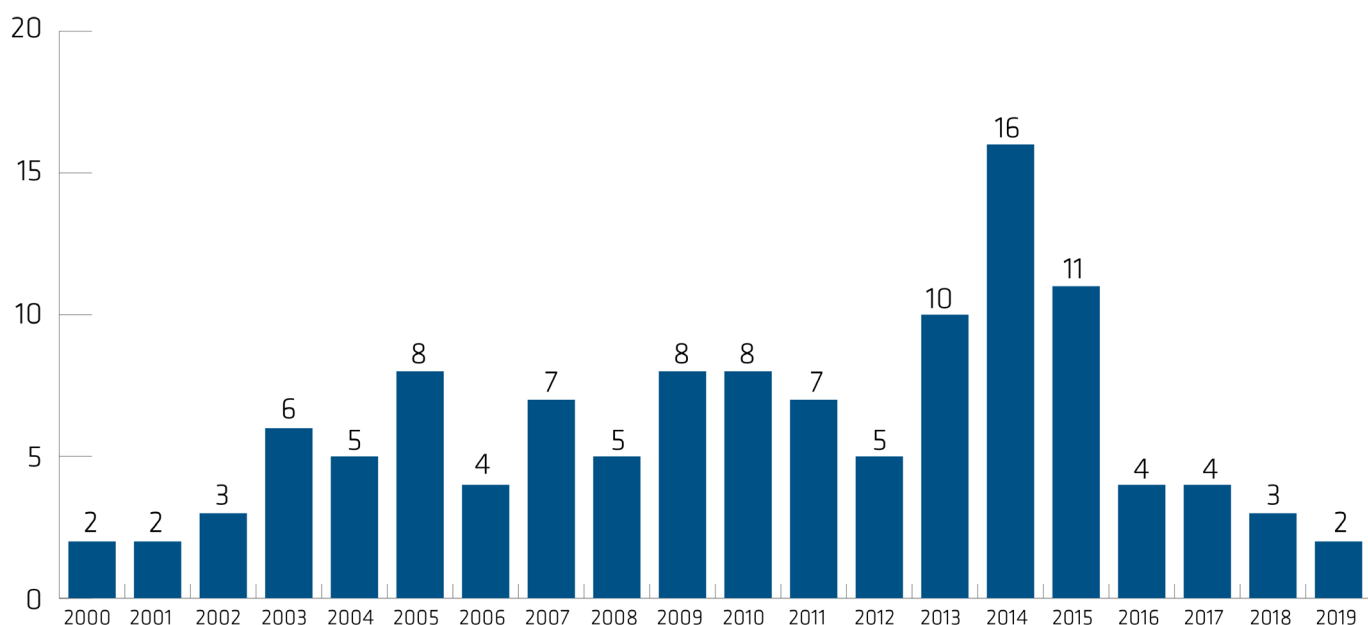
For the purpose of this briefing, **merger** will be used to refer to both mergers and concentration processes.

This briefing outlines findings from the 129 cases reported across 22 countries in the EUA University Merger Tool.

A general trend?

EUA recently updated the University Merger Tool and has now mapped mergers and concentration processes up to 2019. As the following graph makes clear, the findings show significant merger activity throughout the period, with a spike in mergers/concentration processes between 2013 and 2015. The data also points to a decline in the number of mergers from 2016 onwards, which may indicate structural consolidation in most countries' education systems. Nevertheless, EUA has monitored plans for additional upcoming mergers, for example in France (which is, generally speaking, home to the highest concentration of mergers) as well as in Lithuania and Greece, where restructuring is still on-going.

NUMBER OF MERGERS PER YEAR



Student size

- In Europe, most higher education institutions (HEIs) are small to medium sized establishments, with only one in ten having over 20,000 enrolments (as shown in [the ETER report on higher education institutions' size distribution in Europe](#)).
- In a drive to increase visibility and competitiveness, mergers and clusters have produced universities and umbrella institutions with a considerably larger demographic size than that of the average HEI. The following tables highlight the 10 universities with the largest student populations, including and then excluding the French clusters (ComUE).

EUROPE'S TOP 10 UNIVERSITIES (STUDENT POPULATION)

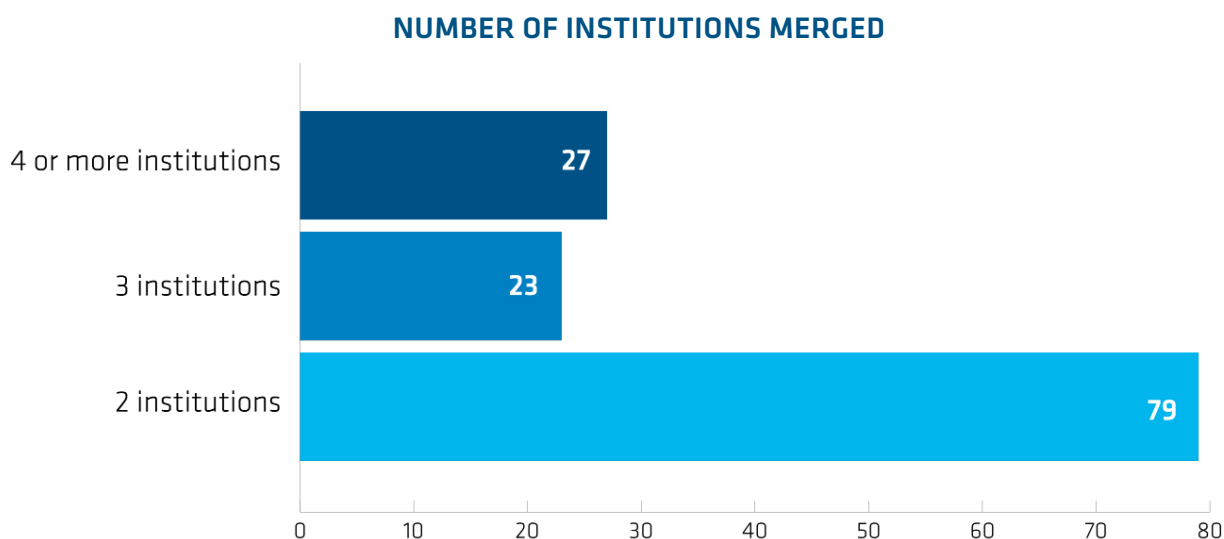
University	Student numbers
ComUE Université Bretagne-Loire	160,000
ComUE HESAM Université	130,000
ComUE University of Lyon	137,600
ComUE Sorbonne Paris Cité	120,000
ComUE Lille Nord de France	115,000
ComUE Federal University of Toulouse Midi-Pyrénées	104,237
ComUE d'Aquitaine	88,697
Languedoc-Roussillon Universities	80,000
Aix Marseille University	72,000
Stockholm University	70,971

EUROPE'S TOP 10 UNIVERSITIES (STUDENT POPULATION), EXCLUDING FRENCH CLUSTERS

University	Student numbers
Stockholm University	70,971
University of Lille	67,000
Sorbonne University	55,600
KU Leuven	55,533
Université de Lorraine	51,868
University of Bordeaux	50,000
University of Lisbon	48,147
Université Grenoble Alpes	46,000
University of Strasbourg	44,991
Uppsala University	41,069

Number of founding institutions

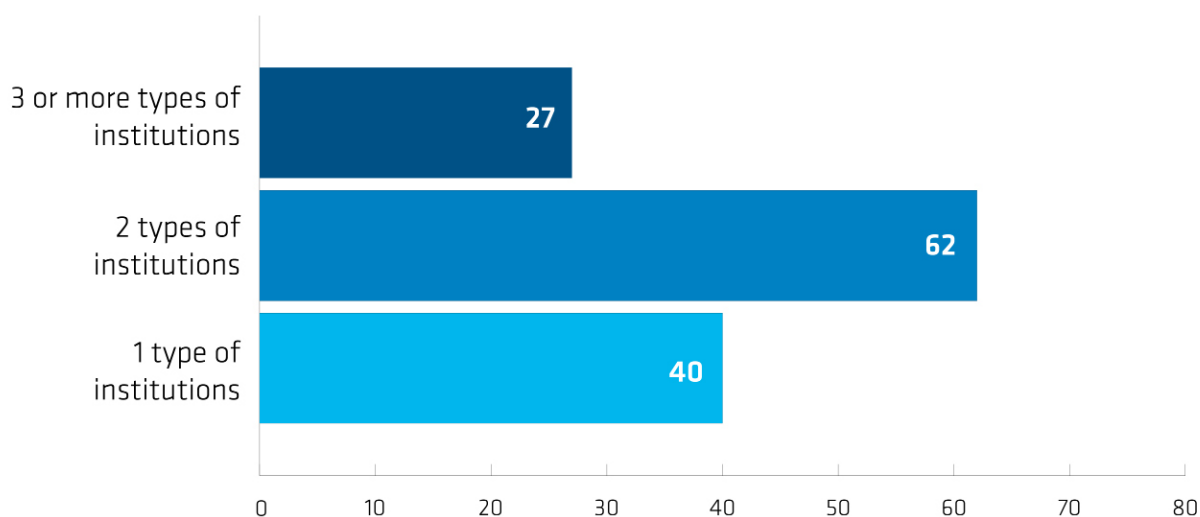
- The following graph shows a breakdown of mergers and clusters by the number of institutions involved.
- Estonia, a system characterised by vertical mergers (large institutions incorporating smaller ones) recorded the highest number of mergers between two institutions. Estonia is followed by the UK, Norway and Belgium.
- ‘Multilateral mergers or clusters’ involving four or more institutions are most frequent in France, as a result of the 2013 law requiring universities to group themselves into wider communities, as well as in Belgium (‘University Associations’). Full mergers involving such high numbers of partners are still exceptional (UK: University of the Highlands and Islands 2011, Estonia: Tallinn University 2005, Denmark: Aarhus University 2007, Technical University Denmark 2007, and University of Southern Denmark 2005).
- Several countries including Belgium, Denmark and France are home to full merger processes involving three institutions. In Belgium, such cases typically involve a university incorporating university colleges. In Denmark, universities were joined by various specialist organisations, including research centres. In France, full mergers often include more than three partners as a result of the division of academic services in the 1960s. This means that mergers designed to create a comprehensive university tend to require the unison of at least three universities.



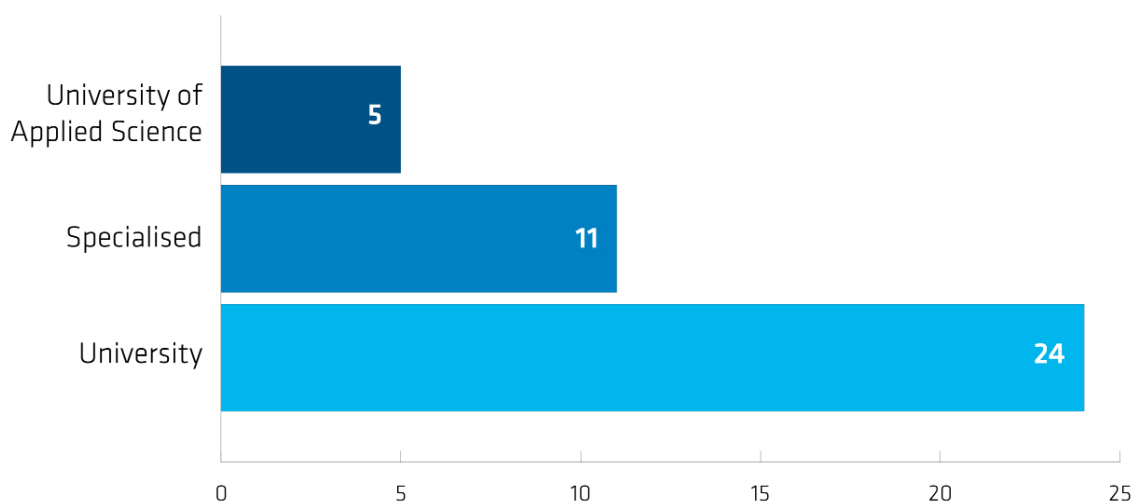
Status of founding institutions

- 62 mergers documented involve two different types of institution. Almost every merger involves a university and either a specialist institution, university of applied sciences, research organisation or other establishment.
- The two other categories are: (40) ‘homogeneous mergers’ (between institutions that share the same status), and (27) mergers or clusters between three or more types of institutions. Most of the latter cases are French ComUEs, which involve relatively large clusters that group different types of institutions under a single umbrella.
- Most ‘homogeneous mergers’ involved two or more **universities**. The 16 other homogenous mergers were either between specialist institutions or between universities of applied sciences. This specific merger profile results in the creation of university institutions. These mergers are scattered around different countries, with two taking place in Sweden and two in Estonia.

TYPES OF INSTITUTIONS



MERGERS BETWEEN SAME TYPE OF INSTITUTIONS



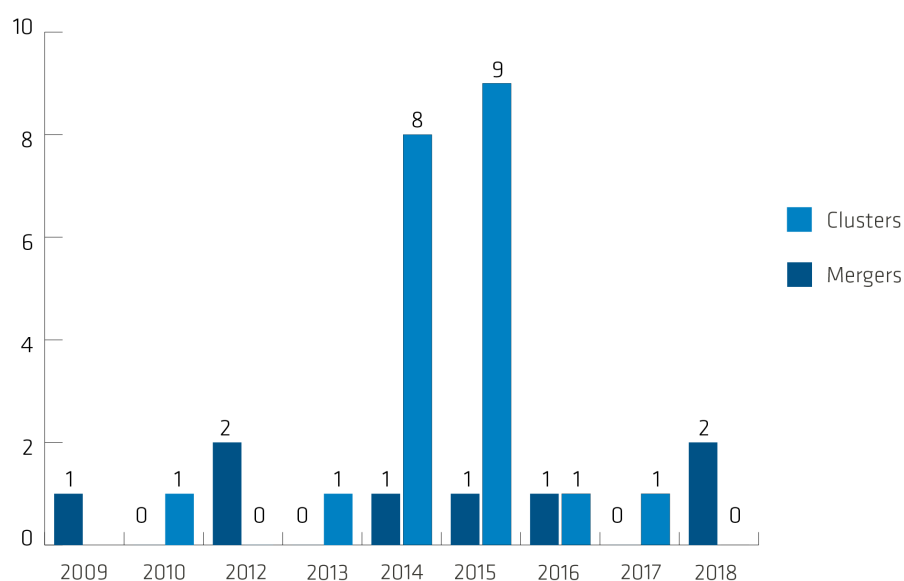
FOCUS

Mergers and clusters are shaped by specific factors and fulfil different purposes in each country or context. This section focuses on three cases that offer examples of diverse profiles. In France, clustering involving different types of institutions is the direct effect of recent reforms, in particular the 2013 law on higher education and research. In Estonia, (mostly vertical) merger activity has sprung up as part of a correction mechanism not prompted by explicit system-level reforms. In Greece, mergers are also vertical in nature but spring from a government decision to reduce the number of higher education institutions in response to the economic crisis.

France: clusters related to system strategy mixed with merger activity

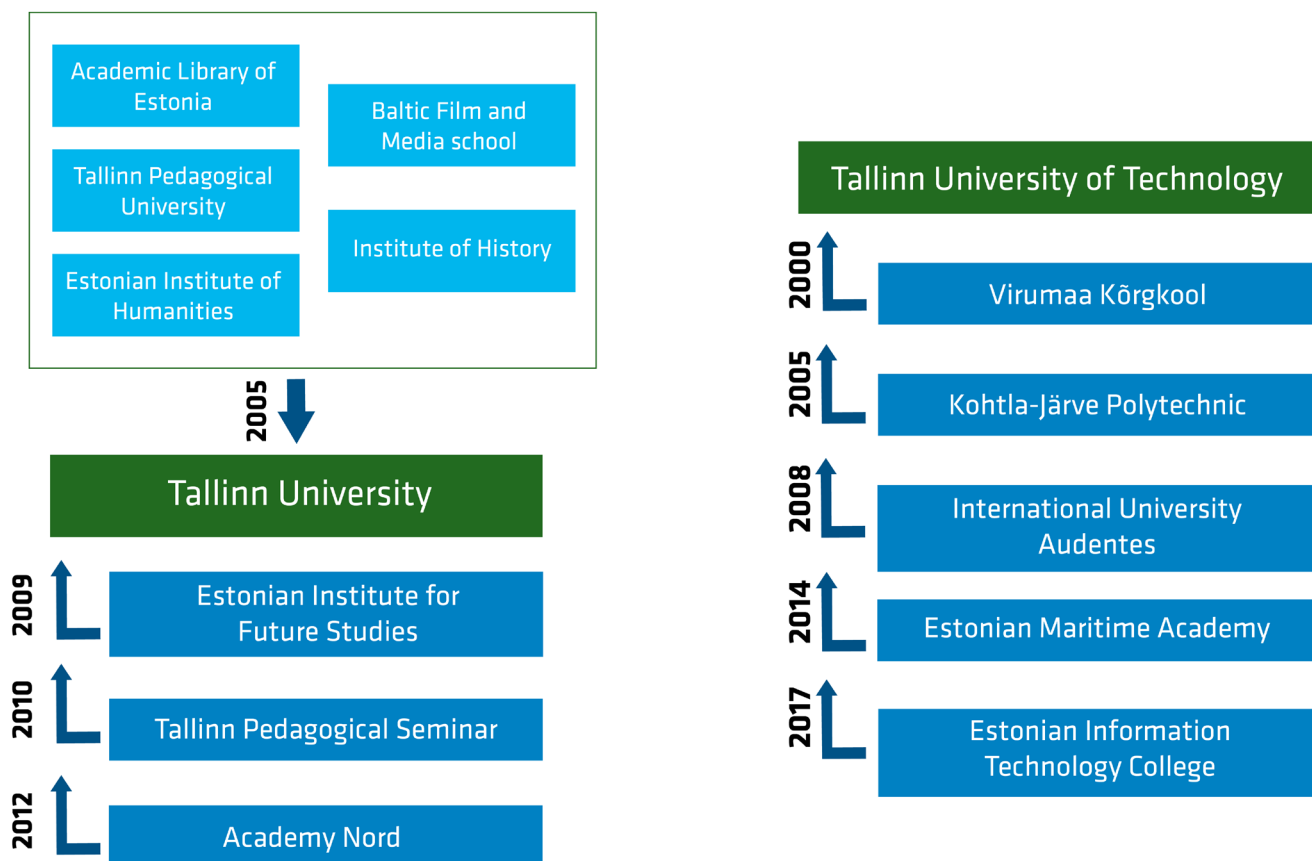
- French clusters were caused by recent reforms to consolidate universities and restructure the higher education landscape.
- The 2013 law on higher education and research (“Loi relative à l’enseignement supérieur et à la recherche”) produced a spike in clusters between 2014 and 2016.
- As such, nine of the 29 reported cases in France are full mergers between two institutions. These mergers occurred evenly across the period analysed, while the other 20 cases were clusters.
- Most mergers (5/9) occurred as the result of ComUE re-organisation, which led to changing cluster dynamics. This phenomenon seems to confirm that ComUEs have a dual role as a vehicle for transition towards more in-depth collaboration between French universities, leading to mergers, and as a structure for cooperation with other types of institutions.
- Merger and cluster activity continued in recent years, including in 2019. The general regrouping of the educational system seems under consolidation, but further adaptations are expected as new rules come into force, allowing for more flexibility and experimentation in the governance of the clusters.
- Several mergers are currently underway, including the University of Paris (officially created in March 2019).

MERGERS AND CLUSTERS IN FRANCE



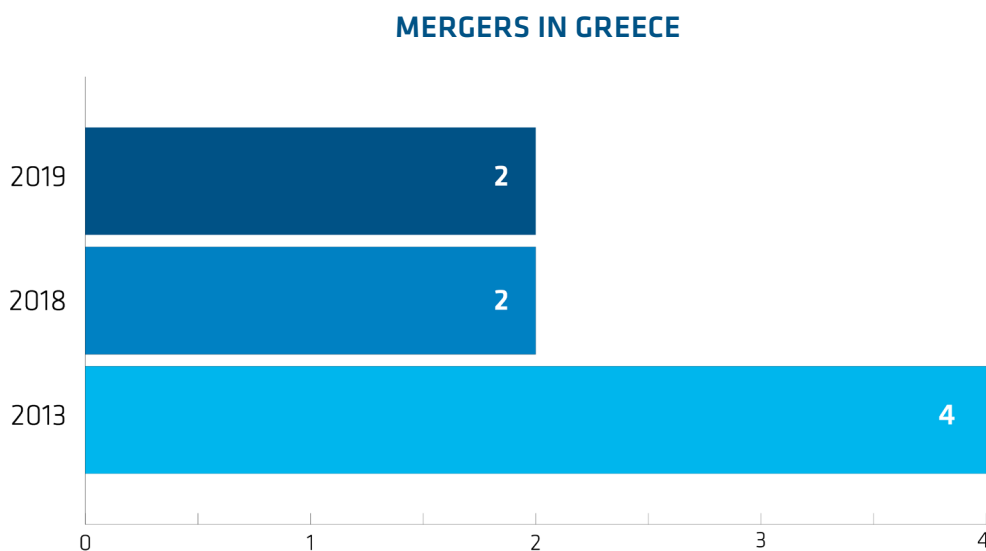
Estonia: vertical mergers

- Mergers in Estonia are more vertical than in France and are part of what can be considered a correction mechanism, following a period of rapid growth in the number of institutions during the 1990s. The process does not result from an explicit overall political strategy at system level.
- Vertical mergers are processes in which large public universities absorb smaller professional higher education institutions and private institutions that often have a specialist academic profile.
- Three main institutions concentrated almost all merger activity in this period and maintained their identity and brand throughout.
- The following graphs map out (1) the vertical merger leading to the creation, and further consolidation, of Tallinn University; and (2) the different institutions integrated by Tallinn University of technology.



Greece: vertical mergers resulting from system strategies

- In Greece in 2009, in the aftermath of the financial crisis and as part of major socio-economic reforms, the Greek government took steps to reduce the number of higher education institutions, to try and ease costs and keep education free for all Greek citizens.
- As the following graph shows, the first wave of mergers was launched in 2012 and implementation, in which several smaller institutions were absorbed by larger HEIs, started in 2013.
- The second wave of these mergers started in 2017, under the 2017 Higher Education Act (4485/2017) and is on-going.
- Technological Educational Institutes are expected to be incorporated into universities by 2020. More merger activity is therefore anticipated in Greece.



Looking forward

The data EUA collected between 2000 and 2019 shows significant merger activity of different magnitudes throughout the period, and in a large range of countries. Although higher education systems in some countries are close to consolidation and merger activity is starting to decrease, system restructurings are still in process in other countries, with more merger activity expected in the coming year. In France, institutional clustering is also prompting intra-cluster mergers. In Lithuania, large-scale restructuring is foreseen with at least three mergers planned for the coming year. And in Greece the second wave of system-level restructuring continues - all technological educational institutes are expected to have been merged into universities by 2020.

Resources

For more on EUA's work on mergers, please consult our [Merger Tool](#), the [DEFINE Thematic Report: University Mergers in Europe](#), and the [Efficiency, Leadership and Governance: Closing the gap between strategy and execution- USTREAM Report](#).

Contact: funding@eua.eu

The European University Association (EUA) is the representative organisation of universities and national rectors' conferences in 48 European countries. EUA plays a crucial role in the Bologna Process and in influencing EU policies on higher education, research and innovation. Thanks to its interaction with a range of other European and international organisations, EUA ensures that the voice of European universities is heard wherever decisions are being taken that will impact their activities.

The Association provides a unique expertise in higher education and research as well as a forum for exchange of ideas and good practice among universities. The results of EUA's work are made available to members and stakeholders through conferences, seminars, websites and publications.