Organizational change and change management

A case study of the process of merger between Å and
Berge secondary schools

Maryna Fedorchenko

SUPERVISOR
Romulo M. Pinheiro

Abstract

This master thesis is a qualitative case study research aimed at assessing and interpreting the process of merger between two public organizations, located within the Norwegian educational sector. The focus of the thesis is to study the process of merger by analysing the key aspects that could, most likely, affect the process flow and outcomes. The aim of the thesis is to address the knowledge gaps, in the literature on mergers, by studying the process of merger as a whole, not just its separate phases. More specifically the thesis investigates key procedural aspects of the merger process. The selected case for the thesis, is the merger between Å and Berge secondary schools that started in 2010 and resulted in building a new Lyngdal secondary school, opened in 2013.

The empirical basis for this thesis is built on a qualitative case study research. A total of seven individual interviews were conducted with the actors that have been directly involved in the merger process from its initiation and up until the end of the project. The majority of respondents were members of the steering group and practically led the merger, giving them good awareness of the process. The empirical findings provided detailed information on the process flow, key stakeholders involved into the process, main challenges during the process of merger and the results achieved.

Theoretically the thesis builds on theories of change management, institutional mergers and organizational theories. I have used a conceptual model for organizational change as a main theoretical framework to analyse the process of merger between Å and Berge schools. The conceptual model enables to look at the change process as a whole. The model is supplemented with additional theories on mergers and leadership to provide more theoretical insights for further studies and analysis of the research question.

Mergers are often seen as a means for achieving certain gains (Skodvin, 1999). The results from this thesis show that the merger was seen as a means for achieving economic efficiency, by merging small institutions into a larger unit. Another key finding is that the merger was a result of public authority's initiative and, as such, was perceived by some actors as being a top-down process. The particular merger case has gained positive end results and good feedbacks has been received following the project's completion. This is the result of good leadership, strategic planning and effective use of external and internal stakeholder's partnership.

Preface

First, I want to express my gratitude to the informants from Lyngdal municipality, Kruse Smith and Lyngdal secondary school, who have contributed to this study with their knowledge and experience, and found time in their busy schedules to set up interviews. I would like to thank the principal of Lyngdal secondary school, Richard Aardal, for his cooperation and help in conducting interviews with school's employees and further contacts with municipality's administration. I also want to thank my supervisor, Romulo M. Pinheiro, for the time devoted to this thesis, his patience and creative ideas.

This half of the year has been rather challenging for me. I have spent most of my time working with the master thesis. Writing this thesis has been both exciting and absolutely demanding process. It has required a lot of time, discipline, concentration and hard working.

I want to thank my fellow students and friends who have always been supportive and encouraged me all the way. I would like to thank, Steve Edney, for his help with proofreading. Last but not least I want to thank my family for always believing in me and not let to give up.

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Contents

1. Introduction

We are living in times that are often characterized by change. These changes are observed at all levels of modern society. It can be said that change is initiated by individuals and expands across organizations, municipalities and further to the governmental level. According to Jacobsen (2012) the phenomenon of change has become central to organizational theory. Instead of being mostly concerned with how one can achieve stability, the focus is now oriented on change: Why does change occur? What are rationales and drivers leading to change processes? How does change happen? What are the most effective methods to achieve it?

One of the main tasks for modern organizations in today's society is to deal with and adapt to changes in their environment, which in turn causes the need for organizations to undertake change themselves to a greater or lesser extent. Likewise, the environments are often ambiguous in their nature (Olsen, 1988) and thus should be carefully taken into consideration. Careful consideration is needed of a number of other factors as well, such as: leadership related challenges, the role of change agents, staff attitudes to change, cultural factor, external pressures for change etc. (Goedegebuure, 2012; Pinheiro et al., 2016).

In order to answer the challenges of changing environments and to be in step with society's demands, a number of public and private sector organizations have undergone the process of merger. Among these organizations, those most involved in merger processes are hospitals, schools, universities and university colleges. The Norwegian educational sector has undergone major changes over the last twenty years with mergers and acquisitions taking place among a number of universities and university colleges (Kunnskapsdepartementet, 2014). Among these are: University of Tromsø, Finnmark University College (UC) and Tromsø UC; Vestfold UC and Buskerud UC. NTNU and three university colleges in Gjøvik, Ålesund and Sør-Trøndelag have merged in January 2016. A new "reform wave" within Norwegian public sector, New Public Management, and a number of government implementations led the Norwegian educational sector being subject to major changes during the last decades.

Mergers as an attractive measure for solving a number of problems and challenges is seen in the Norwegian school sector as well. By means of mergers it is expected that a wide range of problems may be solved, such as fragmentation, small size institutions, lack of financial and specialist viability, confronting external threats etc. (Harman and Harman, 2003). Even though mergers are mostly continuing and costly processes when seen in short-term perspective, they

have the potential to produce substantial long-term gains. Mergers may result in larger and more flexible institutions, increased academic choices for students, improved services, high efficiency and under certain conditions cost savings.

This thesis focuses on studying the merger process between two institutionally equal organizations, Å and Berge secondary schools, that in August 2013 merged into Lyngdal secondary school. The Lyngdal secondary school has been built and operated in cooperation with the contracting company Kruse Smith, which signed the contract as a form of public-private partnership with Lyngdal municipality. Different aspects may be chosen to be studied within the particular case, such as the cultural aspect, post-merger effects, the project's evaluation, implementation model effectiveness etc. The focus of this master thesis is oriented on studying the process of merger as a complex phenomenon. The main goal of the thesis is not to test theories or generalize findings, but to get a full understanding of the particular phenomenon – the process of merger, by studying such critical aspects as: (1) the key driving forces behind the merger between Å and Berge secondary schools; (2) the role of the leader and communication, as critical success factors; (3) resistance to change from the actors involved; (4) the role of external stakeholders. The theoretical objective of the thesis is not oriented on developing new theories, but on using already existing organizational theories in order to illuminate a process of merger within public organizations. The theoretical framework for the master thesis is thus limited to three theoretical main fields: organizational theory, institutional mergers, change and change leadership.

1.1. Research objectives and research question

The thesis, is a qualitative case study research of the merger process between two secondary schools, that took place in the southern part of Norway, in Lyngdal municipality. The purpose of the thesis is primarily oriented on studying the process of merger, by means of analysing in detail the four main aspects mentioned above. Though the main focus is oriented on studying the process of merger between Å and Berge secondary schools, I will also analyse the role of the external stakeholders, contextual frames surrounding the merger and the role of leadership as one of the important factors for a successful merger.

Considering the fact that merger processes are often complex, full of tensions and time consuming (Harman & Harman, 2003), this thesis is going to examine what led to the decision of implementing a merger, what was the role of leaders and external actors, what were the

potential difficulties and what can be learnt from such a strategic decision. The research question to be studied is as follows:

How can the process of merger between Å and Berge secondary schools be assessed and interpreted?

With a focus on the following key aspects:

- *the background and key driving forces that led to the merger;*
- *the role of the leader and communication as critical success factors;*
- *reaction towards the merger and possible resistance;*
- *the role of external actors under the process of merger between Å and Berge secondary schools.*

The reason for choosing this particular research question is that little attention has been paid to studying the process of merger. A lot of focus has been directed on studying the pre-merger phase (studies of the rationale, the negotiations and decision-making) and on studying the post-merger phase (merger outcomes and effects). Far fewer studies have been oriented on studying the merger process as a whole (Geschwind et al., 2016). The aim of this thesis is to examine the merger process more comprehensively by using the conceptual model for change (Jacobsen, 2012) aimed towards opening the "black box" (Pinheiro et. al., 2016) of the merger process. With the aim of operationalization, in the methodology chapter, I present the four variables that correspond with the key aspect of the research question and that are intended to be studied and analysed in this thesis. By means of the following study it is expected to contribute additional knowledge of planning and execution of successful strategic mergers. Such experience should be of value for policy makers, institutional managers and organizations that are planning to implement change. They can learn from other change processes' strengths and weaknesses, so that they are better prepared to organize change in their own organizations.

1.2.   Background of the study

Mergers within the educational sector have become a widespread phenomenon during the last decades. Mergers seems to be the tool for achieving: larger and more competitive units, quality enhancement, economic efficiency and effectiveness (Skodvin, 2014; Harman and Harman 2003; Pinheiro et al., 2016). Mergers and amalgamations have been used by national

governments for increasing quality within the educational sector and for reducing the number of institutions, especially in the case of higher education. Mergers between schools, universities and/ or colleges are those that shaped the Norwegian educational structure. The topic of mergers is extensively researched, closely followed and widely discussed in media nowadays. Therefore, I consider it to be exciting to write a thesis on this topic and to see whether the existing knowledge gives a complete picture of what a merger process in the education sector entails. The background for the choice of the particular case study, the merger between Å and Berger secondary schools, may be explained by the researcher's desire to study the merger process within public organizations. The aim of the thesis is to contribute by studying the process of merger retrospectively. An important objective was therefore to choose a merger that was completed relatively recently, so that the key actors involved into the process still had their memories and perceptions fresh. A further advantage was the relatively close distance between Kristiansand and Lyngdal that gave an opportunity to conduct interviews in person.

1.3. Limitations of the study

The case study of this thesis, the merger between Å and Berger secondary school, is a very interesting and multi-faceted case. To be more precise, this particular merger case was conducted using an alternative form for cooperation and completely new implementation model for construction projects. Here I am speaking about the public-private form of cooperation and the implementation model, lately called "Lyngdalsmodellen". This implementation model has been developed by researchers from the University of Agder and Lyngdal secondary school became the pilot project for trying out the new implementation model. The following points on the variety of different aspects that may be studied within the particular merger case. However, some restrictions are absolutely necessary in order to make the topic of studies more precise and in order to succeed with the research. That is why I chose to concentrate on studying the process of merger by taking into consideration the key factors that could play a central role in different phases of the merger process. I will not concentrate on studying the public- private form of cooperation in depth and/or evaluate the effectiveness of the implementation model. I would like also to mention that due to time constraints, the time that I had available for writing the master thesis, a limited number of the respondents were chosen for interviews. It could have been helpful to conduct more interviews with the internal actors, employees from both schools, in order to get a better understanding of the process. It should also be mentioned that two

respondents have declined to give interviews because of personal beliefs or circumstances. This could also have influenced the richness of the empirical data collected during the interviews.

1.4. The outline of the thesis

The thesis focuses on answering the research question posed above, by means of theoretical perspectives and empirical data collected during the individual interviews. Further, the findings will be analysed and concluded with the results presentation. The thesis consists of seven chapters. The first chapter introduces the research objectives and research question, presents the background of the study and outlines the restrictions of the thesis. Chapter number two presents the context of the study. The chapter deals with the main reforms implemented within the Norwegian school sector and describes the main features of the school sector. Chapter number three constitutes the thesis' theoretical framework. The chapter starts with the presentation of mergers seen as a type of organizational change. Further schools as public organizations and the professional bureaucracy as a type of organization are presented, for providing an overall understanding of the type of organization the study focuses on. Finally, a conceptual model for change is presented for further studies and analysis of the merger process. Chapter number four contains the methodological framework and research design. This chapter provides a detailed introduction of qualitative case study research, presents individual interviews as a method for collecting empirical data and highlights the validity and reliability of the data collected. The methodology chapter also contains the description of how the study was performed and describes further treatment of the empirical data. Chapter number five contains the case description and the empirical data presentation. This chapter begins with the case presentation of Lyngdal municipality and of a new-built Lyngdal secondary school. The chapter presents the empirical data collected during the interviews that is set up in the same order as the four key aspects intended to be studied within the research question. Chapter number six consists of an analysis carried out on the basis of theories and empirical data. Finally, chapter number seven summarizes and concludes the results and findings of the thesis.

2. Context of the study

This chapter presents a context of the study and makes a literature review on reforms and mergers within the Norwegian school sector. To analyse the process of merger between Å and Berge secondary schools in a larger context I consider it critical to provide information on reforms in the educational sector. This should be helpful in understanding a bigger picture and describing the macro environment, where my case study is located. The chapter starts with the description of school sector as an organizational field and deals with the main reforms and changes implemented within the school sector in Norway.

2.1. School sector as an organizational field

To understand the main fields and the context of study, it is important to introduce the levels I have been looking at while studying the process of merger. The three different levels may be identified in the studies of merger, in accordance to the research objectives: the micro level (individual and institutional levels), the meso level (inter-institutional level) and the macro level (national overall perspective) (Skodvin, 1997). Mergers at the micro level include individual and institutional levels. The focus of such micro studies is oriented on the effects the merger has on the institution and the individuals within the institution studied. The studies of the micro level are primarily oriented on the individual's attitudes and reactions towards change. The meso level is an inter-institutional level, where the main analysis is concentrated around the processes between the institutions. Most research of mergers in the educational sector are made at the meso level, where the focus is oriented on studying the interaction between the institutions and its main actors. Studying the meso level implies, studying the main cooperation forms being used, main objectives settled, forms for motivation and communication. Mergers at the macro level involves overall national perspective and is often regarded as a tool for political or institutional authorities to initiate the change process and restructure the educational system (Skodvin,1997).
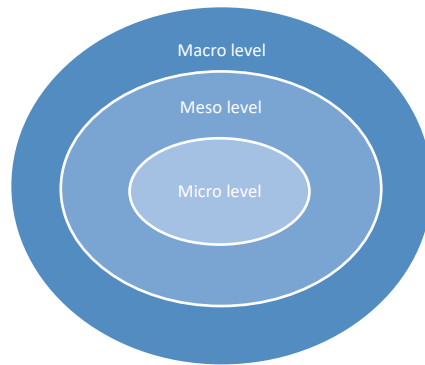
Figure 1: Different levels for studies

This study contains elements from all the three levels presented above. I have conducted the interviews with the actors from both institutions, involved in the process of merger, this constitutes the micro level that is characterized by studying individual's attitudes and reactions towards change. The main focus of this study is concentrated at the meso level, that is the inter-institutional level and is focused on studying the process of interaction between institutions by studying the cooperation forms being used, forms of communication and motivation. The macro level of this study is performed as a tool for political authorities to initiate the merger process and restructure the educational system. The macro level may be also presented by studying the national context, namely reforms within the school sector that I am going to present next in this chapter.

2.2. Reforms within the Norwegian school sector

Reform ideas may be defined as circulating, more or less precise, recipes for how organizations should be controlled, managed and organized. They may also be defined as a change effort with the objective of changing one or more of an organization's modes of functioning (Røvik, 2014). In recent decades, an increasing number of attempts to restructure and de-regulate education sectors have occurred in various parts of the world (Whitty, 1998; Helgøy, 2006). During the last two decades, in particular, the question of how to govern the educational sector has also arisen in Scandinavian countries, leading them to participate in this global wave of educational restructuring (Helgøy, 2006). Accordingly, it may be stated that educational institutions have become more change oriented and generally more receptive to reform ideas.

The Norwegian education sector has undergone a number of reforms that in total have led to its current state. Mergers within the educational sector have been a common phenomenon both nationally and internationally. Constant changes in modern society challenges organizations

and demand changes within organizations. It has been emphasized by Burke (2002) that the environment is changing increasingly and educational institutions need to adapt to the new changes by means of institutional mergers, amalgamations or other types of transformation. Though the majority of reforms undertaken by the Norwegian government and the Ministry of Education have concerned the higher education sector, namely mergers between universities, universities and university colleges, university colleges and high schools. The Norwegian school sector did not stand aside and has undergone a number of reforms during the last decades.

In 1994 the Compulsory School Reform Act for upper secondary education was introduced. The reform act intended to create a more integrated and better co-ordinated system. Reform 94, ensured that all young people between 16 and 19 years were entitled to three years' education, qualifying them for getting full or partial study competence and further rights for taking a higher education. This education provides vocational skills or qualifies students for college or university studies (Anderson, 2001). The background for the reform took its origin in several negative traits within the already existing upper secondary education system. First of all, the specialization offers were too extensive, making it confusing for the students to make a choice. Secondly, the correlation between school program and workplace requirements was poor. The main aims of Reform 94 were better developed study program offers, better student flow, and easier access to higher education. The reform merged a number of study courses and shut down some of them. Finally, the number of study courses were limited to 13 basic courses that students could choose between (Rudi, 2007).

The next Compulsory School Reform for primary and lower secondary schools came into force in 1997. The most central issues within the reform were: school starting age at six years old, ten-year schooling and a new curriculum. The main objective of the reform was that all children would receive an education that equiped them to meet the challenges of the future and would grow up in an environment that generates confidence and security (Andreson, 2001). Some of the main targets behind Reform 97 were: emphasis on compulsory schooling as a school for all, creation of a common curriculum (all pupils being taught the same centrally defined subjects), and stronger emphasis on equal value and gender equality (Andreson, 2001; Rudi, 2007).

The reform introduced in 2006, named Knowledge Promotion (Kunnskapsløftet), involved a number of changes within basic education, including changes in the content, structure and organization of primary schooling up to the upper secondary education level. The main changes in the Norwegian school sector as a result of the Knowledge Promotion were: school curriculum with clear goals, reading and writing skills from the first grade, introduction of new subjects,

local freedom of choice when it comes to working forms, learning materials and organizing of teaching.

"The aim of the reform is improved learning outcomes for all students. Norwegian school should be an inclusive school where there will be room for everyone. Everyone should be given the same opportunities to develop their abilities. Knowledge Promotion should contribute to ensuring education for all students and place greater emphasis on learning" (Kunnskapsdepartementet, 2016).

A number of mergers took place between Norwegian upper secondary schools. For example, Bodø upper secondary school and Asphaugen upper secondary school have been merged together in April 2003. Fosen upper secondary school is the result of merger between Fosen and Orland schools in 2000. Mergers are often justified by the need for economic savings or increased efficiency. As a result, eight schools in Hordaland were merged in August 2003 (Berntsen, 2004). One of the reasons that mergers take place between schools is that Norway has a number of small municipalities with low population rates. Often schools, in such municipalities, are struggling to obtain sufficient numbers of academic staff and of pupils in classes. That is why mergers or amalgamations are seen as a means of improving school offers.

2.3.   Features of the school sector in Norway

The Norwegian school sector is quite fragmented. The sector includes a large number of actors and interest groups. Schools should cooperate with and adhere to a number of different institutions: child welfare, national centre, social and welfare-related services, universities and colleges, parents, central education authorities, school owners, political authorities, others schools etc. (Tronsmo, 2012). According to Helgøy (2006) schools may be described as balancing between the state, the market and the academic authorities.

"Schools have been a part of a strongly specialized organizational structure, a typical sector organization with strong connections from the municipality at the bottom to the state on the hierarchical top. The authority levels are tightly interwoven, which mean there are strong relations and collaboration between the school principals, the municipality's school administration, the regional authority and the ministry" (Ingrid Helgøy, 2006 p. 95).

Norwegian schools, on the one hand, may be seen as horizontally structured administrative bodies, constructed for implementation of government policy, but on the other hand, as fragmented and independent organizations. From this perspective, it may be seen that intension

of implementing any modifications or change can be very challenging and rather difficult within the school sector. The strong position of the profession and education administration is also one of the factors protecting the sector against policy and institutional changes (Helgøy, 2006). However, the Education Directorate (Utadinningsdirektoratet) is working with a number of measures to make development and change in the sector easier. In 2008, the Directorate established a special department for implementation and change, which is now integrated into a larger development department (Tronsmo, 2012). Accordingly, the focus on change and development is gradually increasing in the school sector.

One of the fundamental changes that took place within the school sector in Norway is transfer of responsibilities and powers from the Ministry of Education to municipalities, and further from the municipalities to school principals. The Norwegian government has delegated responsibility for the schools to 428 municipalities and 19 counties, that are known as school owners (Tronsmo, 2012). In their turn, school owners have reduced their academic responsibilities, delegating much of the responsibility to school principals. However, the educational system in Norway is still controlled by the central government, namely the Ministry of Education. One of the main responsibilities of the Ministry is to ensure school programs and school's conditions are, more or less, identical across regions.

At the end of this sub-section, I would like to mention that Norway is a sparsely populated country that consists of a large number of small municipalities. This leads to the fact that a number of small municipalities miss academic competence and do not have enough expertise and powers to operate schools in a satisfactory manner. A number of primary and lower secondary schools are quite small and it is not unusual for children from different grades to share the same classroom. Many primary and lower secondary schools are combined and are taught at the same school (Andreson, 2001). Tronsmo (2012), emphasizes that many school owners (municipalities) are primarily concerned with budgetary control and are less concerned with quality of the schools, and the teaching and learning results. In addition, the author underlines a lack of feedback about schools as organizations. Little interest has been paid to the sector as an integrated system. It means that schools are often seen as institutions consisting of individual teachers and separate classes, and seldom seen as a community or an organization.

3. Theory

This chapter presents the theoretical framework that will be used for further discussions and analysis of the empirical data. First, I will start by presenting mergers as a special form of organizational change. Further, I will describe schools as public organizations and schools as professional bureaucracies. I consider it to be essential and helpful in forming a comprehensive understanding of the type of organization the study focuses on. Finally, I will introduce the conceptual model for change, which will constitute the theoretical framework for further analysis of the process of merger between Å and Berge secondary schools. I will present the main elements that constitute the model, describing them in the light of merger, leadership and organizational change.

3.1. Mergers as a form of organizational change

A big interest in mergers has been emphasized during the last decades. Mergers have become a common reform measure in both public and private sectors, where the pursuit of efficiency is often the driving force behind the merger (Solstad, 2009). Mergers were previously related more to the private sector than to the public one. However, the situation has changed and nowadays mergers in the public sector are a common phenomenon. The following may be seen and explained in the light of New Public Management, as a trend in which public organizations learn from private sector organizations, concentrating on such factors as: greater emphasis on competition, performance measures, strong governance and accountability (Solstad, 2009).

The term "merger" implies an association of two or more organizations into a single entity. Researchers give a variety of definitions for the term, mainly depending on the sphere and circumstances in which a merger takes place. According to Harman & Meek (1988) and Goedegebuure (1992), a merger can be defined as the combination of two or more separate organizations, with overall management control coming under a single governing body and single chief executive. Normally all assets, liabilities and responsibilities of the former institutions are transferred to either a continuing institution or to a new institution (Harman & Harman, 2003). In merger literature, a number of analytical approaches, classifications and definitions have been applied in order to understand and explain the phenomenon of merger. Thus, Goedegebuure (1992) in his studies identifies the four main types of merger:

- Horizontal merger – a merger between fairly equal institutions that operate in similar academic fields and are oriented towards a similar type of product, in which the smaller part is integrated in the larger one.

- Vertical merger – a merger between institutions that operate in similar academic fields and are oriented towards a different type of product.

- Diversification merger – a merger between institutions that operate in different academic fields and are oriented towards a similar type of product.

- Conglomerate merger – a merger between institutions that operate in different academic fields and are oriented towards a different kind of product (Cai, Pinheiro, Geschwind & Aarrevaara, 2015).

Harman (1991) distinguishes between merger as *consolidation* and *acquisition,* dependent basically on how the organizations have been integrated together. A consolidation assumes merger of at least two institutions, usually of equal size, where the participating institutions, by means of merger, lose their autonomy and are completely transformed into a new single entity (Harman, 1991). Acquisition implies that one institution absorbs the other one without being substantially affected. For example, in the case where some faculties within the institution (university or college) are transformed into a major university.

Skodvin (1999) and Harman and Harman (2003) distinguish between *voluntary* and *involuntary* institutional mergers. Voluntary mergers are initiated by the institutions, while forced or involuntary mergers may be initiated by external actors such as the Ministry of Education, local political leaders etc. Skodvin (1999) also defines between "top-down" and "bottom-up" implementation models of merger. The following implies that voluntary mergers may be associated with bottom-up implementation process, where the initiation comes from institution's management. Involuntary mergers are associated with a top-down implementation, coming from the state agencies, political authorities. However, it has been noticed that in practice it is rather hard to find the pure form of any merger type, especially in public systems. Different types of merger are believed to be mixed and/or combined with each other.

Harman and Harman (2003) outline the importance of institutional mergers in addressing a range of problems. Even though mergers are mostly continuing and costly processes, in their nature, they have the potential to produce long-term benefits. Such benefits as: larger and more flexible institutions, improved student services, stronger academic programs, enhanced student

choice, higher efficiency and under certain conditions cost savings (Harman & Harman, 2003; Harman and Meek 2002).

Merger may be a good solution to a number of institutional problems, but at the same time, in order to achieve success by means of a merger, effective leadership and stakeholder's cooperation are required. Harman and Harman (2003) emphasize that the chance of achieving a successful merger will be greatly enhanced by creation of a shared vision and negotiation of possible gains and advantages. Change leaders should be strongly committed to the idea of merger and be effective in communicating it's benefits to others. The implementation of merger will also depend on the type of the organization, where the merger takes place. Therefore, in the next sub-section I am going to describe schools as public organizations, to get an understanding of the type of organizations we are dealing with.

3.2. Schools as public organizations

Jacobsen and Thorsvik (2013) define organizations as social systems that are deliberately designed to solve specific tasks and realize certain goals. Schools may be characterized as formal public organizations, that have their special interests and responsibilities, with their special organizational design, made up to solve specific tasks and realize certain goals (Christensen, 2007). Schools as public organizations can be described as having the following characteristics:

1. They are headed by appointed representatives and are accountable to the democratically elected political leaders. They should adhere to democratically elected groups.
2. They act in a complex social and political network, where there are no clear solutions for what norms, values and interests should be prioritized. Such types of organization are not easy to re-organize in accordance with changing demands from the environment or from changing political leadership.
3. They are multifunctional, public organizations which should work in accordance with and safeguard key constitutional values such as equality, predictability, transparency, openness of decision-making processes and quality of service etc.
4. Are formally owned by the state authorities and governed by elected politicians. They have a fixed organizational structure and a specific way, they operate on.
5. They do not operate within a market, they do not sell their services and accordingly do not get any feedback from markets (Christensen, 2007).

In order to understand how schools and other educational institutions function, it is necessary to look at them as organizations consisting of people, who have their roles and are working together in order to achieve common goals. Public sector organizations have a wide spectrum of tasks, but first and for most, they carry out tasks on behalf of society. Public institutions can thus be understood as tools or instruments for achieving certain goals seen as important for society, such as raising the standard of education. This may be seen as public organizations acting with instrumental rationality in fulfilling tasks and achieving the desired results (Christensen, 2007).

Schools as public organizations may be described as loosely coupled systems. Weick (1976) describes educational organizations as loosely coupled systems. The author emphasizes frequently and loosely coupled linkages between employees and departments within the educational organizations. By loose coupling, the author means the type of relations where each of members is somehow attached to each other, but at the same time preserves its own identity and a type of separateness (Weick, 1976). For example, in the case of school academic staff may be said to be loosely coupled to the principal. The point is that the principal and academic staff are somehow attached, but they still retain some identity and separateness. There are some advantages and disadvantages of loosely coupled systems. As for the advantages, organizations with loosely coupled systems do not have to respond to small changes that occur in the environments, by changing the whole organization. Within loosely coupled systems there is a possibility to implement localized adaptations, when needed. This means that any element within the organization can adjust to new regulations and modify without affecting the whole organization. Loosely coupled systems are said to be relatively inexpensive because of reduction of the necessity to coordinate people that is both time and money consuming. However, there are some disadvantages within loosely coupled systems, one of them is that it is more difficult to coordinate loosely coupled organizations. It may be demanding to create a common identity among employees and different departments (Weick, 2001).

Schools as public organizations may also be distinguished from one another according to whether the formal organizational structure is built vertically or horizontally, whether they are centralized or decentralized, whether they have a simple or a complex structure, bureaucratic organizational form or horizontal specialization (Jacobsen and Thorsvik, 2013; Christensen, 2007). Schools, as organizational forms, may be seen as bureaucratic organizations with strong elements of hierarchy, constant routines and clear division of labour. I am going to discuss this

in more detail in the next sub-section concerning the description of professional bureaucracies as an organizational type.

3.3.   The professional bureaucracy

Henry Mintzberg is a key theorist within the organizational theory. In his article "Organization design: fashion or fit?" Mintzberg (1981) describes five main organization components: strategic apex, operating core, middle line, techno structure and the support staff. Out of these the author works out five types of organizational configurations, with their specific structure and work performance function. The five configurations are: simple structure, divisionalised form, adhocracy, professional bureaucracy and machine bureaucracy.

Schools as organizations fall under the category of professional bureaucracies. Schools are highly specialized institutions with horizontally built structure. They have few levels, often with small representation of administrative management and big operational core. The operational core works mostly independently and has a high degree of freedom and control over their own work and responsibilities. The administrative management has their legitimacy so long as the professional staff perceive that their interests are fulfilled and safeguarded. Responsibilities within professional bureaucracies are largely decentralized and have a high degree of democracy (Mintzberg, 1981; Jacobsen & Thorsvik, 2013).

Bureaucratic organizational form is marked by three elements - hierarchy, division of labour and routines (Christensen, 2007). Hierarchy consists of superior and subordinate positions and various vertical levels in an organization. By means of hierarchy it is meant that the communication is going through the downward channels, while someone in the superior position commands and instruct subordinates. Information and any proposal goes upwards through reporting systems. With the division of labour, it is meant that an organization`s tasks are grouped into different units and tied to concrete positions – in other words, horizontal specialization (Christensen, 2007). Within the bureaucratic organizational form there is a large degree of labour division. This organizational form is also characterized by a number of routines, fixed rules and procedures about how the work should be performed and who is responsible for its fulfilment. These routines may be written in such documents as regulation manuals and guidelines.

According to Henry Mitzberg (1981), professional bureaucracy has the following dimensions:

- standardization of skills;

- much horizontal specialization;

- little formalization of behaviour;

- little planning and control;

- much training and indoctrination.

Professional bureaucracies are characterized by high professionalism, much of decision-taking powers and much of freedom in the operational core. There is emphasis on standardizing task-solution through systematic recruitment of professionals representing a common professional knowledge, in such a way decisions-taking authorities can be decentralized because of the operational core, who is capable of solving tasks on a satisfactory manner. By means of standardization such organizations create predictability with regard to how tasks will be solved. The organizational structure is highly specialized and appears to be horizontal built. One of the classic examples of professional bureaucracy organizations are educational institutions, in my case schools.

3.4. Change management

Both the notion of schools as public organizations and the concept of schools as professional bureaucracies, presented above, are helpful in understanding of the type of the organization being studied. But are still insufficient for studying the change processes. That is why I choose to use a conceptual model for change, advanced by Jacobsen (2012) for assessing the change processes within organizations. The model is presented in the book "Organisasjonsendring og endringsledelse". The main argument of the model is that it gives a possibility to look at the organizational change as a whole. The conceptual model attempts to study not just separate fragments, but gives an understanding of the whole process of change. The model may be said to come as a criticism of the fact that more often than not, only separate parts are studied within the organizational change, instead of studying the change as whole. The conceptual model, worked out by Jacobsen (2012), enables studying all the factors that play a role in the process of change and makes it possible to understand the reasons why change occurs within a particular organization. The conceptual model emphasizes that change is not a simple and unambiguous phenomenon. The process of change consists of a number of dimensions that are both independent and are deeply interconnected. Therefore, the conceptual model gives an

opportunity to see a bigger picture of the change process. The model consists of the four elements: driving forces, content and scope, context and process. The arrows in the model below illustrate that the four aspects are interrelated and can influence each other.
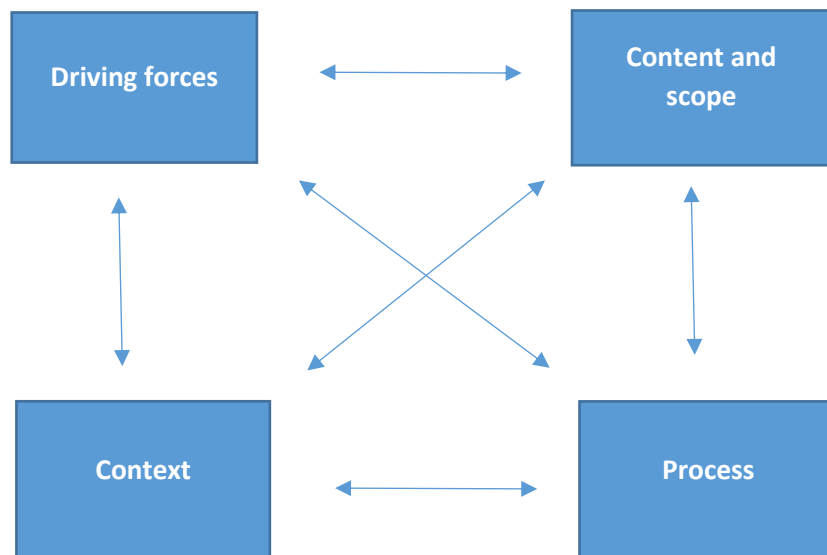
Figure 2: A conceptual model for change (Jacobsen, 2012, p. 32)

It should be mentioned that the model is conceptual, not empirical. This means that it is not intended to test or check directly empirically. Rather it should be understood as a framework, as a way to organize reality (Jacobsen, 2012, p. 32). The model fits well in the context of this study's research question, intended to study the process of merger between Å and Berge secondary schools. Below I provide a description of each of the model's four aspects and explain them theoretically. In addition, I will add the four main aspects with some extra sub-sections in order to provide more theoretical insights for further analysis of the key aspects within the research question.

3.5. The driving force

Organizational change has become a central research question in a number of studies and disciplines. Key research question includes: How and why change unfolds? What makes organizations change? What are the drivers of change? What are the end goals and expectations? All these questions are oriented to answer why social systems change. Although organizations are initially considered to be relatively stable systems, it is hard to imagine an organization that would not change throughout its lifetime. Jacobsen (2012) emphasizes that

organizations are social systems, not physical objects and are thus constantly in one or another form of development. In order to understand what makes organizations to break out of a relatively stable state and try to create something new instead, we should understand what is it that drives change – what are the driving forces for change.

Harman and Harman (2003) in their work about institutional mergers within the higher education sector identify important drivers of change, namely: (1) increased efficiency and effectiveness; (2) action to deal with problems of institutional fragmentation; (3) improved student access and greater difference in courses; (4) increased level of governmental control over the overall direction of the higher education systems (Harman & Harman, 2003). Mergers initiative may be driven by different actors, both inside and outside the organization. While some forms of collaboration may arise from external pressures, like governmental or community groups, the others may come from academics or professionals' own initiative (Harman & Harman, 2003).

Organizational change is not a new phenomenon, it is rather seen as something both usual and necessary. Organizations are constantly under the press of change that comes both from inside of the organization and from its environments. Van de Ven and Poole (1995) have done an interdisciplinary literature review to identify such pressures, or as they called them – the "motors" for change. The four main "motors" for change are: (1) planned change, with intention as a driving force (teleological model); (2) change as a lifecycle, with growth as a driving force (life-cycle model); (3) change as an evolution, competition for scarce resources (evolutionary model); (4) change as dialectic process, with conflict of interest as a driving force (dialectical model). In this study, I am most interested to have a look at the teleological model, where the intensions are seen as driving forces for the planned change. That is why I am not going into details of each perspective, instead I choose to concentrate on planned change and on the change agents, as those who are leading the process of change.

3.5.1. The planned change

Jacobsen (2012) calls the planned change an analytical and rational approach. The following approach is based on a perceived need for change. In other words, an organization changes because of some individual's or group's intention to ensure improvement or survival of a particular organization. By means of change it is expected to achieve certain intensions or goals. The group of people or change agents, analyse the current situation and work out solutions for

how the organizational state may be improved. The planned change process entails four key phases:

1. Diagnosis – recognition of the need for change, due to problems or new opportunities.
2. Solution – figuring out the measures, which will provide a solution to the current problems and the desired end result.
3. Implementation of undertaken measures – planning of how the organization will undergo change and setting a time schedule for these changes.
4. Evaluation – analysing and summing up if the measures are working as expected and stabilization of the new state achieved (Jacobsen 2012).

The driving forces in the planned change may be divided into internal and external. The internal driving forces are the conditions within the organization, and may include: poor working conditions, conflicts and bad working relations, lack of motivation among employees, etc. The external driving forces refer to the change that takes place outside the organization – the organization's external environments – to which the organization must adapt. For example, changes in government regulations, globalization or new political demands, changes in access to competence and working force, amongst others.

The driving forces may have a varying level of clarity and strength. The clarity of the driving forces depends on by whom and how well they are presented. The more people agree about the same aspect, the clearer the driving force is. The strength of driving forces refers to the perception of how important and what kind of impact the driving forces may have on the organization. The greater the agreement among the actors involved, that something should be done and how exactly it should be done, the stronger and clearer the driving forces are. The clarity and strength of the driving forces have a great significance for the ability to implement a planned change process.

A key challenge in the planned change processes, is that driving forces rarely emerge objectively. There is always a room for interpretation. The reality may be interpreted differently, within the organization, since employees with different positions and different work responsibilities, often interpret the reality differently.

"In a school, teachers will often have different perceptions of the situation than the city council or the municipality administrative management. ... It is difficult, if not to say impossible, to determine who is "right". Rather, we are talking that one sees different aspects of reality and thus also emphasizes various factors differently" (Jacobsen, 2012, p.58).

3.5.2. Change agents

Jacobsen (2012) describes the process of change as such that starts with someone's subjective understanding of the need to change. Said differently, the driving forces are not purely objective and are not faceless, they consist of people, in our case – change agents. By change agent it is meant – a person or a group of people who want to introduce and implement change (Jacobsen, 2012). Change agents can basically be anyone, but in major organizational change, they are found within the organizational management. The change agent has always his/her own perception of the current situation and possible ways for improving it. The major task of a change agent in the first phase of the change process is to examine the current situation and identify potential crises and/or great opportunities (Kotter, 1995). Burke (2002) emphasizes the importance of analysing environments, creating the vision for change and its communication, in order to be able to implement the change. The change agent has the central role in creating clarity for the need to change, creating an active support and communicating the way.

It is common to regard a change as a process consisting of several stages and phases. Lewin (1997) emphasizes the importance of three fundamental stages before starting the process of change: interpreting the future; drawing a picture of the future and the way forward; and communicating it through language and actions. The author also mentions the three steps for change, starting the process of change with "defrosting" then moving to "implementation" and finishing with "freezing" the future state. The following concept emphasizes the role of change agent even before starting the process of change, namely in the "defrosting" phase. The change agent should pay close attention to the first phase, trying to find the best way on how to create the appropriate climate for the change both inside and outside the organization, what measures need to be taken in order to complete the transition from present to the future desired state.

3.6. The change context

Previous studies have shown that it is easier to implement change in some types of organizations and environments than others. In order to understand how different environments, types of organizations and their cultures can influence the process of change, it is worth to have a look at the change context. The context implies things that are taking place both inside and outside the organization. That is, the internal and external context. It is important to understand an organization's internal and external context in order to understand an organization's ability to change. The context can be considered as a type of impersonal "forces" which either makes it

easier or more difficult to change an organization (Jacobsen, 2012). The internal context is linked to the characteristics of the organization. The external context consists of the organization's environments (Jacobsen, 2012). The sum of internal and external contexts determines how easy or difficult it may be to implement change in a particular organization. The context, both places restrictions and opens possibilities for the change process to take place.

3.6.1 Internal context

The internal context is primary based on the assumption that no organizations are alike. Organizations vary in their structures and strategies, tasks and technologies, organizational size and age, culture and power relations etc. The above mentioned characteristics of organization's formal and informal elements come into play and determine the organization's internal context. Stating it differently, the internal context involves the organization's unique mix of people, structures, power relationships, norms and values (Jacobsen, 2012). Pettigrew (1987) emphasizes that the internal context concerns about structure, culture and politics within the organization.

Organizations are extremely different and complex in their nature, that is why it can be difficult to understand what leads to change in one or another organization. Jacobsen (2012) emphasizes the importance of organization's size, age, history and structure on how easy or difficult it will be to change the particular organization. When considering the size of the organization, it seems that the larger the organization is, the harder is it to change it. The reason for this is that big organizations turn out to be complex structures, with a number of rooted procedures and routines, with a number of different departments and units. Large organizations, with a large number of employees often imply existence of different groups, and thus different meanings and interests within them. As a result, a number of different reasons to resist change (Jacobsen, 2012). Increased organizational size means increased complexity. Another essential factor is the fact that the more time and effort one has invested in a particular organization, the harder it is to break out. The last critical factor is correlated with organization's age and professional competence.

3.6.2. External context

The external context may be characterized along two dimensions: the technical environment and the institutional environment (Scott, 2008; Jacobsen, 2012). The technical environment refers to the organization's degree of stability and complexity. This involves matters affecting

the organization's resource access, and conditions that are important for organization performance. The institutional environment refers to stability, regulations, normative and cognitive conditions. Institutional environments are seen as those that counteract the change and maintain stability (Jacobsen, 2012). Change takes place in different contexts and environments. Studies have shown that different environments in varying degrees allow changes. External context, in its turn, may affect the possibility for change. Meyer and Stensaker (2011) notes that different organizations have different capacities to absorb impulses from the environment and adapt to them. Thus, organizations have different ability to learn from what is happening in their surrounding environments (Meyer & Stensaker 2011; Jacobsen, 2012).

As already mentioned above, the external context consists of organizational environments. How and to which extent environments influence the organization will depend on which type of organization we are dealing with. Accordingly, voluntary or public organizations operate in a context where they have no market. Services performed by public organizations are often free or government-funded, for example in the case of public schools. A basic characteristic of this type of organizations is that feedback from the market is absent or unclear (Jacobsen, 2012). For example, a public school will not be affected by changes in the commercial market in the same way as a private company will. The main problem may arise, when considering the need for change, as different views are certain to become apparent. Unclear or absent signals from the market can act as a barrier for change to take place.

3.7. The content and scope

Organizational change may be studied at different levels: individual level, how individuals change; group level, how the cooperation between individuals' changes; organizational level, how different part of an organization or the organization as a whole changes. Changes at the organizational level may include, but are not limited to, changes or modifications of strategies, structures, tasks and cultures (Jacobsen, 2012, p.65). The content of change refers to the particular change elements within a given organization, and often includes:

- goals and strategy;
- formal structure;
- organizational culture;
- power relationships (Jacobsen, 2012)

The content of change in the process of merger between two institutions, largely depends on the way the institutions are merged. The extent to which the institutions are integrated will define which adjustments or changes are necessary (Skodvin, 2014). Thus, total integration will lead to changes within the organizational structure, goals and strategies. By merging two institutions into one a growing necessity of setting new structures, new tasks and duties may arise. When two organizations integrate into a new one, coming from different working cultures, it results in cultural changes. The difficulty of change implementation will also depend on what type of organization we are dealing with. In a large organization with well-founded rules and working routines and with highly educated employees working independently, the organizational change will be more difficult to implement, than in a small, top-down controlled organization with a small number of employees (Cai, 2015).

According to Jacobsen (2012), the change scope may be distinguished between two main types, change as violation (revolution) and change as development (evolution). Organizations may be subject to changes of various scopes, not all changes are as comprehensive or dramatic. Some changes will be dramatic and represent a break with the past, while other changes will be of a more adjusting type, and thus will represent a further development of how the work was performed earlier (Jacobsen, 2012). Skodvin (1999) describes institutional change as such that include abandonment of existing norms, forms of governance, objectives and academic programmes. Such changes have often been described as drastic and dramatic (Skodvin, 1999).

While dramatic change involves the break with old routines, change as development implies small adjustments or improvements. Development is something that takes a long time and does not have clear time limits. Revolutionary change happens quickly and often brutally. It starts as a rule with the organization experiencing a "shock" or with a change in the environment which leaders could not anticipate; for example, financial crisis, new political reforms, changes in municipal politics. Such changes in the environment can directly influence the organization. Change as violation will require involvement of all organizational elements simultaneously. Change as development may address some certain organizational elements and by adjusting them create a better coherence among them. It turns out to be more demanding and difficult to implement revolutionary change, rather than to implement some adjustments within the organizational framework. If one should carry out revolutionary change in an organization, he or she should expect to operate within a short time frame (Jacobsen, 2012). Thus, this is a big challenge for those attempting to lead such change processes.

3.8. The change process

Jacobsen (2012) defines the change process as a complex series of actions and events that evolve over time and bring the organization from one state to another. Accordingly, the change is something that happens over time. The change that takes place within the organization or some parts of it, may be observed as a state that has evolved and became something else, measured between different periods of time, where time is seen as an important tool for measuring and understanding change (Jacobsen, 2012; Van de Ven & Poole 2005). Skodvin (1999) notes that the merger with its variety of required changes, is not an event but rather a process as well. The author emphasizes that merger processes are often associated with tensions and dynamics that include uncertainty, risk, the need of negotiations, planning and leadership. Thus, when the focus is set on the change process, some important aspects clearly come forward. These are change leadership, time, support for and resistance to change. I believe it is important to highlight the following aspects for further study and analysis of the change process.

3.8.1. The role of the leader

Change, by definition, requires creating a new system which in turn demands effective leadership (Kotter, 1995). The process of merger, as one of the forms of organizational change, entails significant leadership challenges. According to Harman and Harman (2003) a successful merger, is above all characterized by visible and strong management. Thus, leadership has been identified as one of the important factors for a successful change process. Geschwind (2016) underlines that an active leadership throughout the various phases of the merger processes is a crucial factor, regardless of the type of merger. The literature on mergers emphasizes the role of the leaders and formal managers in facilitating staff interaction through: creating a common vision, defining and communicating strategic plans and taking into consideration personal interests of staff members (Kotter, 1995; Pinheiro et al., 2016). Cai (2015) notices that the change leaders act as "institutional entrepreneurs" who do not only initiate change but also actively participate throughout the process. Engaged leaders throughout the process is an important factor for successful merger and leader's personal authority, commitment and skills are decisive for the outcome of the process (Stensaker and Kyvik, 2005; Jacobsen, 2012).

Kotter (1995) in his research about leading change, emphasizes the importance of creating and communicating the vision. The author describes a vision as a mean for clarifying direction in which an organization needs to move. Vision should help in directing the change effort and it

should be presented as a picture of the future that may be easily communicated to the main stakeholders. The change leaders are also responsible for developing the strategies for achieving the vision. Jacobsen (2012) defines a vision as something that binds the whole organization together around the common goal. By means of creating a vision it is expected to make employees more engaged in the process and at the same time reduce the level of resistance. Kotter (1995) also points out the importance of creating a powerful guiding coalition, as one of the steps to successful change. The guiding coalition must be made of people representing different departments and levels of the organisation, with a broad range of skills. The group of a guiding coalition should have enough power and knowledge to lead the change, it should consist of at least several leaders and senior managers (Kotter, 1995). The task of the guiding group is to get people together around the same goal, develop shared understanding of possible problems or opportunities, and create a good level of communication and trust. Good change management is thus associated with creating good communication both inside and outside the organization. Jacobsen (2012) emphasizes the importance of creating right "climate for change" and readiness for change among central actors. That is why communication about intentions and progress, and creating a vision of the future state are of significant importance.

Establishing a sense of urgency has been also defined as one of the steps to transforming an organization. It is easier to realize and agree with the necessity of change when the driving forces are clear, and when the main actors realize the consequences of not changing. Kotter (1995) further notes that successful change efforts starts with some individuals or groups analysing a company's competitiveness, financial performance and market position. After observing and analysing some decline or reduction, leaders should find the best way to communicate the information, with an emphasis on potential crises, risks or great opportunities for the organization. When the feeling of urgency is strong, it is more likely that the majority of employees and parties involved will be willing to implement change. The role of the leader is thus to create this feeling and communicate the importance of change constantly to co-workers and parties involved. The change should be seen as a solution to the current problems and the best way out of the crisis situation. The end results should sound convincingly, and the change should be understood as being good for the organization as a whole and for each and every employee individually. Finally, Kotter (1995) mentions some more critical steps while leading the process of change, namely: creating short-term wins, consolidating improvements and creating still more change, and institutionalizing new approaches.

The steps, mentioned above, constitutes the eight steps to transformation of an organization, worked out by John Kotter and presented in his research "Leading change: why transformation efforts fail" (1995) and later in the book "Leading change" (1996). The following steps may be regarded as the main priorities of the change leaders on the way to the successful change. The eight steps are widely discussed and often used in the literature on mergers, organizational change and transformations.

3.8.2. The time element

Time is an essential element in the process of change. As already mentioned above, change may be declared, when we observe the organizational state has changed between two points in time. The time aspect provides boundaries for the types of change that are possible to implement. Some organizational elements may change faster than others (Huy, 2001). For example, formal organizational elements like structure and strategy will change faster than informal elements such as culture and power relations. One of the characteristic of the informal element is that it is something that emerges as a result of the interaction between people in an organization, and thus is a result of events that often takes place far back in time (Jacobsen, 2012). The formal elements can change much faster. However, if organizational members do not agree with change initiatives, this may cause a wave of disagreements and may stop the process of change.

One more important aspect that is directly connected with time, is management's ability to create an understanding of importance and urgency for change. Creating support for change is closely linked to how change agents manage to interpret and convey the driving forces and right solutions, whether they manage to create a perception that change is important, right and good (Kotter, 1995; Jacobsen, 2012). Effective communication of high urgency and the need for change will bring together the actors and will motivate change. The absence of urgency, on the other hand, may result in a low degree of willingness to change among the actors involved, the process may take longer time and various oppositions groups may be formed.

3.8.3. Support for and resistance to change

Support for and resistance to change are natural elements of the change process. Both resistance to and support for change initiative are considered as being something personal, that is, built up on personal perceptions and understanding of change initiatives. The most commonly used theory of support for change, is based on Meyer and Allen's (1991) seminal work. The authors

refer to three types of support, namely: support as necessity; normative support; and affective support. The three types are believed to indicate different degrees of support, from relatively weak and small to a strong and stable support. Necessity support concerns the investments that have been done in a particular organization and other alternative possibilities that are waiting outside the organization. The more one has invested in an organization, the greater cost will be to break out. Normative support relates to experiences people have with what the organization has done for them in the past, creating a sense of duty to return the favour back to the organization. Affective support contains an element of excitement. Here are the people who decide on accepting the change initiative because they believe in it, believe it is good and right and that the consequences will be great, both for the organization and its employees. This is the strongest form of support towards the change process. Actors with affective support will help to drive change forward (Jacobsen, 2012).

Skodvin (2014) notice that merging process rarely or never have a smooth path. General challenges with mergers are that they are often associated with stress, tensions and fear. Thus, organizational changes are rarely seen without resistance and change agents should be prepared for handling tensions and opposition. Some change initiatives are well accepted and may be easily implemented, while others may lead to a strong opposition. Such situations may have a plenty of different reasons. Changes should be seen in connection with people who are involved in the process of change and are affected by it. Organizations consist of people, thus peoples' perception of how the change will affect them may either create loyalty or resistance. To understand why the opposition appears among employees, it is necessary to understand how the change affects each individual, as well as the relationship between individuals – social relations (Jacobsen, 2012).

Jacobsen (2012) defines a number of reasons why resistance may arise. Among these are: professional disagreement, fear of the unknown, loss of identity, loss of personal goods, loss of social relations, additional work and new responsibilities, change of power relations, change in social environments etc. For the majority, change means going from old and familiar structures and routines in favour of something new and unknown. The change process can thus easily create a sense of uncertainty. Uncertainty may be defined as the basic feature of change (Stensaker and Kyvik, 2005; Jacobsen, 2012). It is never possible to ascertain clearly and objectively the need for change, which means that there may be many different opinions on what is the actual situation. Furthermore, it is not possible to say confidently that some particular measure will manage to solve the problem. According to Pfeffer (1992) at the time

the decision is taken, it is not possible to determine for sure whether it is good or bad. It is necessary to wait until the decision have been implemented before its consequences are clear.

Jacobsen (2012) notes that organizational changes are often associated with people, who often have to change their jobs, move from their offices or start working in other buildings. Both work duties and physical space, are things that are commonly associated with emotional connections and create an identity related to the tasks an individual performs and the physical environment he or she is located within. Organizational change in this case may be seen as a threat to "identity", on which one has invested a lot of his or her efforts and feelings. In addition, organizations are usually heavily rooted in a local community, which particularly makes organizational change more complicated, in case when the change brings consequences for this community. All organizations are located in a certain district, and physical relocation or reductions of the organization will often cause difficulties for local residents. Such situation means that workers need to change place of residence or leads to longer commutes to work or school. These particular conditions can lead to organizations that attempt to move or close down, meeting with strong protests from community groups (Jacobsen, 2012). All of the above-mentioned reasons can, to a lesser or greater extent, lead to resistance among employees, local population, and internal and external actors. The intensity of the resistance can be divided into three different phases: indifference (lack of interest); passive resistance (negative views and attitudes); active (strong critical opinions, peaceful boycotts and protests) and aggressive resistance (refusal of implementing change initiatives, more violent strikes and campaigns) (Coetsee 1999, p. 207-208).

According to Tyler and De Cremer (2005) one of the best ways to deal with resistance is to have a fair and open process of change. This can be referred to as procedural justice (Tyler and De Cremer, 2005). Employees who oppose the change, are more likely to accept it when the process is perceived as fair. Jacobsen (2012) emphasizes that employee's attitudes may be changed over time as they get more information and are more involved into the process. Still it remains to be one of the main tasks of leaders, i.e. to reduce resistance to change and by means of communication and guidance, create a strong change coalition.

4. Methodology

In the following chapter I am going to present the research design of my work, in particular the methodology methods that are used for collecting data, processing and analysing it. According to Kvale and Brinkmann (2009), the term methodology originally means path to the goal. By presenting the methodology chapter I will describe how the goal of the research is going to be achieved. I am going to choose the most appropriate models and methods in order to get the most reliable and correct data. To answer the research question, I chose to conduct a qualitative case study of the process of merger between Å and Berge secondary schools. According to Robert K. Yin (2014), a case study gives a deeper and more detailed understanding of a single phenomenon, therefore I consider the qualitative case study approach to be the most appropriate one.

4.1. Choice of the research question

The choice of the research question is an important part of an investigation process. According to Johannessen (2006) this is the research question that decides further choice of the methodology, theories and that actually influence on the whole success of the research project. Such critical steps in the research process as: selection of respondents, preparation of the interview guide, collecting, processing and analyzing data are all regulated by the choice of the research question. Saying it differently, by means of formulating the research question, it is possible to define and give direction to further work. That is why the formulation of a precise and relevant research question at the beginning of the research process is an important factor. The more precise the research question is, the easier for the researcher to give a constructive answer to it. A good research question is formulated in a precise manner so that it clearly indicates what and whom is going to be examined (Johannessen, 2006).

As already mentioned above, a research question should be restricted by what we are going to focus on in our research. When defining a research question, we decide to study a particular question or particular case. At the same time we decide not to look at some other aspects. Such restrictions are essential in order to succeed in our research. Other demands of a research question are that it should be: exciting, simple and prolific. The research question should be exciting. It should be interesting both for the researcher to work with it and for others to read the result of the work. It should be simple in its nature and should focus on a particular question. Results of the research should provide new knowledge. They may not be revolutionary, but they

can be a continuation and/or some new aspects based on the earlier research works (Jacobsen, 2005).

I have spent some time on developing my research question and consider it to meet the three demands mentioned above. Having in mind that it should be possible to examine the research question empirically, I have tried to make it more concrete and simple. After going through the literature on mergers, I found some good ideas for my research question and tips about what more can be studied. That is why my research may be said to be built on earlier research and I hope to come with new angles that is saying about its prolificacy and excitement.

4.1.1. The content of the research question

According to Jacobsen (2005) in order to study the research question, we should approach it closer by defining four main units in the research. First of all, research units should be defined and they are those whom are we going to study. In my case the research units are presented by Berge and Å secondary schools. The second important part of the research question are variables, namely what are we going to study in the research. In my case I have defined four independent variables and one dependent which are going to be presented later in this chapter. Further it is important to present the special values within the variables and the frames that the research units are located within or the context of the research units.

In order to operationalize the research question I choose to use the four independent variables. The independent variables consist of the four main aspects that I am going to look at more closely, in order to be able to give an answer to my research question. In this paper, I want to study the process of merger between Å and Berge secondary schools. Since the study is aimed to explain how a merger process may be assessed and interpreted, the merger process itself constitutes the dependent variable. The four aspects taken in order to approach the research question are meant to make up the study's independent variables, in order to identify and approach the process of merge. In other words, these are those that are expected to affect the dependent variable, as illustrated in the figure below.
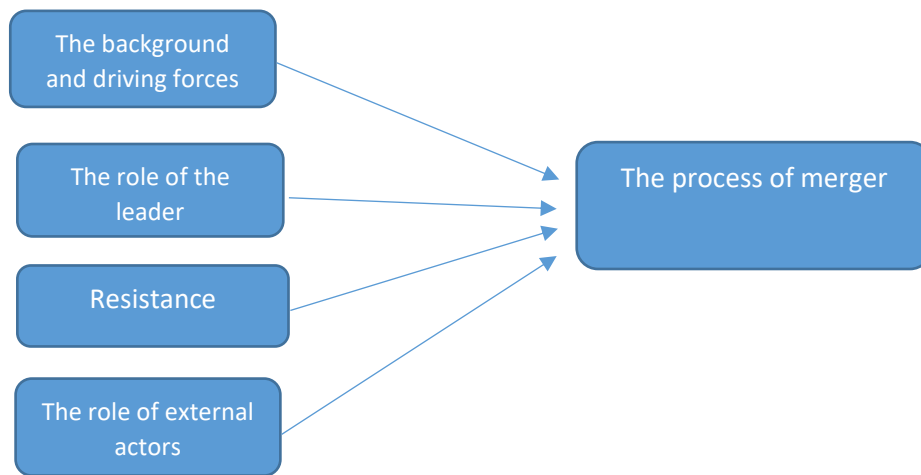
Figure 3: Independent variables

I would like to point out that the timeframe for the process of merger are begins in 2010 when the municipality decided that two schools should be merged and continues untill the opening of the new Lyngdal secondary in August 2013. Thus, the time period covered in this study is between the spring of 2010 and the autumn of 2013.

4.2. Research design

After having operationalized the research question, the next step is to find the most appropriate research design. "A research design is the logic that links the data to be collected (and the conclusions to be drawn) to the initial question of study" (Yin, 2014, p. 26). Every empirical study has its research design. According to Yin (2014), research design is a logical sequence that connects the empirical data with the study's research question. Jacobsen (2005), points out that the choice of research design has a big impact on research's validity and reliability. There are a number of research designs to choose between. Some are more suitable for describing a particular research question when compared to others. This will say that the choice of the research design is determined by the type of research question we have. The choice of the research question and research design or methodology are deeply interconnected (Jacobsen 2005). There is no universal model for choosing the right research method design, so the path to the goal is to be defined by the goal itself (Kvale og Brinkmann, 2009).

Research design may be classified after the following characteristics: whether the study goes in width (extensive) or in depth (intensive), or whether the study is descriptive or explanatory (causal). In this study, the focus is oriented on a limited amount of organizations, and that is

why the intensive research design approach was found to be the most appropriate one. To go in depth of the research will say, to look closer on the variables I have chosen to study. The main focus of the intensive research design - is to get a complete picture of the event or phenomenon, by interviewing the main actors involved. The researcher is interested to get the details of the particular situation and consider individual differences in understanding it (Jacobsen 2005). That is why, I consider intensive research design to be most suitable for my research work, in order to highlight different aspects within the phenomenon studied.

4.2.1. Case study research

Case study research is oriented on studying a particular social phenomenon or situation by describing all the aspects within it. Case study may involve different objects of study: single individuals, groups of people, organizations, institutions, social or political events, processes, particular situations (Jacobsen 2005). According to Robert K. Yin (2014) case study research investigates a contemporary phenomenon, the "case", in its real-world context. This type of research design fits for my studies, which focuses on studying the process of merger as a complex phenomenon. The main goal of this study is not to test theories or generalize findings, but to get full understanding of the particular phenomenon, namely the process of merger between Å and Berger secondary schools. According to Yin (2014) there are five main components of the research design in case studies, that are especially important. Those five are included into this study and attempted to be fulfilled, namely: case study's question, theoretical propositions, units of analysis, the logic linking the data to the propositions, and the criteria for interpreting findings. Case study approach is best suited when the researcher has little or no control over the case of studies (Yin 2014). In my case I had no previous knowledge or connection to the institution studied, or its members. This gives me the possibility to be neutral while collecting and analyzing data.

4.3. Qualitative approach

There are two main research methods that one can choose between. The first gives results in numbers (quantitative), while the second gives results in words (qualitative). In other words, quantitative data operates with numbers and quantity, while qualitative data operates with words and personal opinions that are communicated primarily through language and actions. It is hard to state which one method gives best results, or which one is more effective. Both

research methods are equally effective, but they are best suited to study various issues and various research questions (Jacobsen, 2005).

To answer my research question, I chose to conduct a qualitative case study research. The qualitative research methods are almost always intensive in their nature, that is to say that they are going in depth on some few entities (Jacobsen, 2005). By going in depth, it is possible to get a comprehensive picture of the relationship between research entities and the context in which they are founded. Since I wish to get a full picture of the process that led to the merger between schools. I consider going into depth of the process as an appropriate decision for investigating the research question. By answering the research question I would like to examine the process of merger more comprehensively and analyze the process of merger as a whole, by means of studying closer the driving forces and backgrounds for merger, the role of the leader and communication during the process, and the role of external actors. The choice of these aspects can be explained by review of the literature on mergers, where these dimensions are pointed out to be critical for studying the complexities associated with the process of merger. The following aspects are also relevant in view of the field of my study and research question posed in the introduction chapter. The qualitative research methods will be used by means of data collection through individual interviews. The information will be collected in the form of words that will be recorded and transcribed afterwards. I would now like to discuss the main advantages and disadvantages related to the use of qualitative research method.

Advantages

There are a number of advantages that may be mentioned in respect of use of qualitative analytical methods. Among these are emphasis on the details, nuance richness and emphasis on the uniqueness of each respondent (Jacobsen, 2005). Therefore, the data we get through qualitative method approach, is well suited to bring out some specific, unique understanding of each informant and its context. Openness is a key word for the qualitative research method. In this case openness means that the researcher, in a small degree, has decided what he or she is going to investigate. That means, it is up to respondent and the interview situation itself to decide what kind of information the interviewer is going to get. The researcher, in a small degree, manages the interview process and the respondent's answers. It is the respondent, who largely defines what is the correct understanding of a particular phenomenon or situation. The qualitative research approach is rather flexible in its nature. The research question may be changed or amended as we learn more. There is a possibility to go back and change the research

question and data collecting model while the research is still going on. In such a case the research question is not locked in (Jacobsen, 2005).

Disadvantages

As for the disadvantages, first of all, it should be mentioned that this type of research method is resource demanding. In my case, where I take individual interviews as a method for collecting data, it demands time for preparation before taking the interview, agreeing a time and place for a meeting, possibly traveling etc. Next, after having conducted the interview, the researcher ends up with a big amount of complex data, which has to be structured and analyzed. That is not an easy task, when the data collected is highly detailed and nuanced that in it's turn demands a lot of time for analysis. Since interviews are often time-demanding, researcher should often limit themselves to a certain number of respondents and go in depth instead of going wide. The fact that the interviewer may reduce the number of the respondents can lead to the problem of representativeness. This points clearly to the fact that qualitative approaches often have a problem with external validity (Jacobsen, 2005). Further, flexibility that has earlier been treated as an advantage may also carry some problems in it. Such a problem, as Jacobsen (2005) describes, is a feeling of "never being done". Some new aspects and information may constantly appear that force a new amendment and/or changes within the research question. That, in its turn, prevents the completion of the research work.

4.4. Data collection

The choice of data collection method is mostly dependent on the information that we want to get and the type of the research question we have. My research question is oriented on studying the process of merger between two secondary schools. In order to study and analyze variables around these I considered it necessary to get closer to the main actors involved in the process, getting different opinions, perspectives and nuances within the phenomenon studied. The way to do so is to use individual interviews as a method for collecting empirical data. When collecting empirical data, I have mostly used primary sources, the information gathered directly from the informants, interviewed specifically for this master thesis. Some secondary sources have been used as well, in a form of earlier research around theme, reports and project presentations worked out in relation to mergers. I would like to continue with presenting research interviews, as a qualitative method for collecting data. Further I will clarify respondent selection method, interview context and the interview situation itself.

4.4.1. Research interview as method for collecting data

An interview is a dialog between two people about a topic that concerns them both. A research interview is a professional conversation in which knowledge is constructed by means of interaction between interviewer and interviewee (Kvale og Brinkmann, 2009). The resulting knowledge is created through sharing of questions and answers and is a joint product of both participants. The further production process continues through transcriptions, analysis and reporting of findings, done by the researcher.

The qualitative research interview attempts to understand the world from the interviewee subjective side, in order to bring out the importance of respondents experiences, and to uncover their understanding of the world. Through conversation we get to know something about the respondent's experiences, feelings, attitudes, and the world they live in (Kvale og Brinkmann, 2009; Jacobsen, 2005). According to Kvale and Brinkmann (2009) human interactions and exchange of knowledge are the main objectives in an interview. Interview conversation is lead, to a particular degree, by the interviewer who actively listens and monitors the responses, helping to determine the conversation's direction. The interviewee in turn expresses beliefs and opinions on the topic under consideration. Interviews are well suited to bring out certain individual's interpretation of certain phenomena. We clarify the individual's understanding, what kind of opinion they have about certain points. The choice of data collection method always has consequences for the results of the study. Therefore, it is important to be aware of the choices we make, and how they can affect the outcomes we get (Jacobsen 2005).

4.4.2. Data collection and respondent selection

Qualitative method approach is characterised by a goal of collecting a lot of information from a limited number of respondents. The choice of how many respondents should be selected and interviewed will depend on what kind of methodology one is going to use and what kind of research question he/she has. In other words, which and how many informants are selected depends directly on the research questions (Jacobsen, 2005).

Jacobsen (2005) describes different types of selection criteria in the qualitative research method. The choice of an appropriate one, as already mentioned above, depends on the purpose of the research. That is to say that selection of the respondents will depend on which information the researcher wants to collect and what type of the research question he/she has. In accordance with my research question, I have chosen the information selection criteria (Jacobsen, 2005).

This type of the selection criteria is basically based on selection of respondents. The researcher selects respondents who have knowledge about the phenomenon being studied and who are willing to provide this knowledge. I have conducted interviews with the main actors involved in the process of merger between Å and Berge secondary schools. In total seven informants representing both external (informants from the municipality council, contractor, process supervisor) and internal actors (school representatives at a management level and school employees). The actors interviewed were involved in the process from its initial phase and remained a part of it through the entire process. Considering this, I can assume that informants possess a full range of information regarding the merger between Å and Berge secondary schools.

Interviews were conducted in offices or working places of the respondents. Respondents were contacted via e-mail and interviews were conducted in the period March-April 2016. Informants understood what was required of them and accepted my "request for participation in the research project". With the help of the request, interviewees were acquainted with the background and purpose of the study, information about confidential treatment of personal information and the main conditions of taking a part in the research. Interviews were recorded after obtaining informants agreement for doing so. Having interviews recorded gives many advantages for information availability and a great overview of data collected. During the first planned interviews, I also obtained further contact details of possible additional respondents, who could be relevant and helpful in completing my research objective. By means of this, elements of the "snowball method" were incorporated (Jacobsen, 2005). The snowball method, implies having no fixed criteria at the start of investigation, but getting some new ideas and new contacts with future respondents during the research process. This means that research may start with even just one informant, who is considered to have good knowledge about the phenomenon studied, and further, during the interview, getting more ideas and tips on who else might be suitable to approach for participation.

4.4.3. Selection of informants

In order to answer the research question and collect good, reliable data, I have chosen informants who have been involved in the process since its initiation and have led the process. To get a full overview of the merger process, I have chosen informants who represent different groups of actors. I have interviewed 4 external actors, representing Lyngdal municipality, the main contractor company and project supervisor, and 3 internal actors representing former Å

and Berge secondary schools. It should be mentioned that the majority of the respondents were members of the project group, which was a main organ in steering the whole project. These factors confirmed that respondents were well aware of the merger process and could provide valuable information. I have chosen to anonymize informants, informing them so during the process of asking them to undersign the request for participation in the research project. Through this, I informed my interviewees that all personal information would be treated confidentially. It is only I, as a researcher, who will have access to information provided. Participants will not be identified in the publication. To ensure this, I have chosen to codify respondents by numbering them (respondent #1, respondent #2, #3 etc.) when presenting the empirical data collected.

In order to make it easier for the reader to distinguish between respondents and to form a full picture of respondent's answers presented further, I consider it essential to clarify the organisation each respondent comes from.

Respondent #1	Respondent #2	Respondent #3	Respondent #4	Respondent #5	Respondent #6	Respondent #7
Lyngdal municipality council	Lyngdal municipality council	Former Å secondary school	Former Å secondary school	Former Berge secondary school	Kruse Smith	External project's supervisor

Figure 4: Overview of the informants

The idea behind the presentation of the organisations respondents come from, is that when respondents are further cited, it should be easier for the reader to get an idea of the informant's views by adding the answers together, and knowing that they belong to a particular respondent from a particular organisation. This, I believe, would have been harder if the informants had only been presented by numbers.

4.4.4. Interview guide

The interview guide is an overview of the topics the researcher is going to go through during the interviews. The interview guide is necessary in order to ensure that the researcher remembers to go through all the themes that he/she wants to investigate. Interview guides may vary in their degree of structure, from lightly structured to highly structured (Jacobsen, 2005).

The interview guide for this master thesis is included in a document attached at the end of the thesis. The interview guide is considered to be semi-structured as it consists of questions composed in advance, before the interviews, with an emphasis on different topics of interest. However, there was still a possibility for respondents to take up certain themes themselves and not to be held rigidly to the interview guide. The interview guide was worked out in accordance with the recommendation by Steinar Kvale (1997, p. 76-78) taking into consideration both thematic and dynamic aspects of the interview guide questions. The questions are thematically related to the subject of the interview and its theoretical concepts, that give the basis for the study and the following analysis. Having in view thematic and dynamic dimensions, the questions are structured to be short and easy to understand whilst being free from academic language. This is done with the purpose of creating good interaction between the respondent and interviewer, and to keep the conversation flowing easily between them.

4.5. Validity and reliability

Qualitative research methods must be subject to a critical evaluation when determining whether the conclusions, we have withdrawn, are valid and trustworthy. To critically discuss the validity and reliability of qualitative research, means to relate critically to the quality of the data collected. It is necessary to analyse if the information we wanted to get was successfully obtained, whether we can transfer what we have found to other contexts, and whether we can trust the data we have collected (Jacobsen, 2005).

Validity

Validity deals with whether we have measured what we intended to measure. Validity is quite a broad and comprehensive term. It may be divided into two categories, external validity and internal validity. The internal validity, as already mentioned above, concerns whether we have measured what was supposed to be measured and whether the measures used are perceived as relevant (Jacobsen, 2005). The external validity, in turn, relates to generalization of findings. That is to say, the extent to which the findings of the study can be generalized.

Internal validity applies to whether the results are conceived as correct. That is, whether or not the description of a phenomenon is correct. Steinar Kvale (1997) defines validity as a statement of truth and accuracy. He argues that the quality of the research depends on its validation, where the findings must constantly be checked, questioned and interpreted theoretically. According to Jacobsen (2005), validation will always entail a test of results towards other research and other

findings. In addition, Jacobsen (2005) presents some more ways to perform validation: validation by checking against theory and empirical data, validation through critical review of information sources and validation through critical discussion of categories chosen. In this master thesis, validation by checking against other theories has been applied. Thus, validity testing consists of checking my conclusions, as a result of the research conducted, against other investigations and empirical findings. The question that was asked is: "What are the others specialist conclusions in relation to the one I came to?" If there are similarities with one or more studies, it may be stated that the validity has been strengthened, but not that the research is completely true (Jacobsen, 2005). Validation also demands critical review of informational sources. For example, whether the correct units were chosen for interviews and whether they conveyed true information. After the main informational sources have been analysed, the next step is to critically evaluate the data categories. Categorization of data is used in order to arrange the empirical data collected during the interviews. The critical review of the categories in the analysis part is an essential factor for further analysis and findings of the research. In this thesis, I chose four categories that are both used for empirical data presentation and for the analysis. The following four categories coincide with the four independent variables that are presented in this chapter and are intended to be studied in this master thesis.

External validity concerns the extent to which the survey findings can be generalized. The purpose of the majority of qualitative research studies is rarely to generalize from selected units to a larger group of units. My research study neither intends to generalize findings with other similar cases. The interviewees spoke on behalf of no one else but themselves. Thus, it is not possible to claim that this particular selection of the respondents is representative of a larger group of respondents that I have not interviewed. The main objective in this study is to go deeper and give a better understanding of the phenomena being studied. The only area, where it is possible to apply generalization of this study, concerns its theoretical generalisation. When my findings, generalised from data selected in smaller survey units (interviewees), may be transferred to the theoretical level (Kvale and Brinkmann, 2009). Accordingly, the purpose of this thesis is to contribute with complementary knowledge to other studies and research dealing with a particular phenomenon.

Reliability

Reliability refers to how reliable research results are, it deals with the results consistency and credibility. Reliability is often treated in conjunction with the question of whether a particular result can be reproduced at other times by other researchers. Basically, it refers to the question

of whether interviewees would change their answers in an interview with another researcher (Kvale and Brinkmann, 2009). Reliability relates to the accuracy of the findings made and investigations conducted. In this study, reliability is related to whether my interview questions are good enough in order to get the information needed for further analysis and for answering the research question. During data collection and its analysis, I have used myself as a main instrument. I have conducted, interpreted and analysed the data collected. The main risk of such an approach is that the researcher may be partial, by only selecting evidence to support their own opinions and ignore other particular pieces of data (Kvale 1997). That is why it is important to clarify explicitly the methods that have been used and reflect on how this may affect results.

4.6. Methodological challenges

There are always some methodological challenges in different research approaches. The methodological challenges for this master thesis may be seen by means of analysing validity and reliability of the data collection, described above. It should also be mentioned that there is always a possibility for misunderstandings both from my side, as a researcher, and from respondents. There is always a chance that respondents may misinterpret the questions being asked, that could lead them talking on some other issues than intended. As a researcher, I may misinterpret the information given during the interviews.

In addition to the above mentioned, there are a number of other factors (interview effect, context effect etc.) that may affect both interviewer and interviewee, and accordingly the results of the research. Jacobsen (2005) presents the factor called "interview effect", which may affect the interview flow, its context and interview's results. Interview situation is dependent upon and may be influenced by both the interviewer and the interviewee. It is almost impossible to control the research situation completely. In addition, interview situation may be influenced by a factor called "context effect". This effect is related to the context in which data is collected (Jacobsen, 2005). In this research, all the interviews were conducted at the working place of the informants, in their natural environment. That is why I suggest that physical context has not influenced the interview flow and the quality of information presented. All the informants have been guaranteed anonymity, before interviews, with the aim of encouraging informants to be open and honest in their answers. However, change processes often imply conflicts and tensions which internal actors are not willing to reveal to researchers. That is why there is a possibility that some information was kept silent, making it difficult to get a full picture of the case, studied.

4.7. Ethical considerations

Qualitative research method in the form of interviews implies getting in contact with respondents and studying their experiences, viewpoints and opinions. To a certain degree, this will mean kind of intrusion into the private life of the respondent. This causes those who wish to conduct studies of other people to face some ethical dilemmas. Such dilemmas should be clarified before starting the research process and the choices made during the process of research should be considered based upon ethical principles. According to Jacobsen (2005) there are three basic requirements related to the relationship between the interviewer and the interviewee. These are: informed consent, the requirement of privacy and the requirement for response to be accurately reproduced.

The fundamental *requirement for informed consent*, is to ensure that the respondent participates voluntary. By means of the informed consent, respondent should be informed about the main purpose of the research, its main features and design. Equally important as voluntary participation is the respondents' requirement of the *right on privacy.* The biggest risk of privacy violation occurs when it is possible for third parties to identify certain individuals in the data materials. The anonymity should be granted and secured by the researcher and it is easier to do so, when the one operate with a bigger amount of the respondents. That is the weakness of qualitative research method, operation with a small amount of informants that makes it more difficult to guarantee anonymity. Anonymity implies making it impossible to link information with someone's particular identity. Going further to the *requirement of being accurately reproduced,* which implies ethical requirement to the researcher to present results completely, putting them into the correct context. This means the scientific quality of the knowledge presented, where the publication of the findings should be accurate and representative (Jacobsen, 2005).

4.8. Treatment of the empirical data

The empirical data for this study was collected through the qualitative research method, namely interviews. Interviews were conducted with the main actors involved into the process of merger between Å and Berge schools, all the interviews have been recorded and transcribed. Transcriptions of the following interviews have been made by myself, by typing interviews in to the computer. I see several advantages in carrying out transcriptions in this way. First of all, it is I who has conducted the interviews and it should be easier for me than someone else to

follow the context of the conversation and interpret the information. What is more, as an author of the master thesis, I have knowledge of the topics discussed and the case studied, giving me an advantage when transcribing data. Such information, if transcribed by others, not the interviewer, could be misunderstood and interpreted in a wrong way. Finally, having empirical data transcribed and available in a written form gives an advantage of easier access and better overview of the data collected. It makes it easier to go back and check specific details when necessary. Furthermore, it is easier to create categories for presentation of the empirical data out of the questions and answers on the interview guide. After having transcribed all the interviews, I was well acquainted with the information provided by the respondents and selected four main categories. The four categories were verified in accordance with the research question and variables within it. The information presented in different categories has formed the basis for further analysis. It was also attempted to link the empirical data collected during the interviews with corresponding theories, in order to find theories which may possibly explain respondent's answers.

5. Empirical data presentation

The chapter starts with a presentation of the case study. The idea behind this is to provide an introductory information about Lyngdal municipality, former Å and Berge secondary schools, the formation of Lyngdal secondary school, the project's organisation and other formalities surrounding the process of merger. This should be helpful in understanding the reasons behind the merger between the two schools and will serve as an introduction for further presentation of empirical data. The empirical data presentation follows after the case presentation. Empirical data presented in this chapter will provide the basis for further analysis work.

5.1. Case study presentation

The case study presentation starts with the information about Lyngdal municipality, where former Å and Berger schools were located. Further the new Lyngdal secondary school is presented that was built in 2013 as a result of merger between Å and Berge schools. After that a brief presentation of the project's organisation follows, before the presentation of empirical data. This should be useful in better understanding of the empirical data and should contribute with the basic understanding of how the project was organised.

5.1.1. Lyngdal municipality

Lyngdal is a municipality town located in the south of Norway with a population of 8497 inhabitants (lyngdal.kommune.no. 2016). Lyngdal municipality is centrally located in the Lister region, in the western part of Vest Agder county. Lyngdal borders with Farsund to the west, Kvinesdal and Hægebostad to the north, Audnedal and Lindesnes to the east and has a short driving distance to larger cities like Kristiansand and Stavanger. The central location of Lyngdal makes it a geographical and communication junction of Vest Agder, where the municipality's main trade and industrial activities are located. The motorway E 39 that connects East and West, goes through a significant part of Lyngdal and has contributed to making the town a regional trade centre. These allows to call Lyngdal as a provider of important services and goods both for its local citizens and for neighbouring towns.

Lyngdal has evolved gradually on its way to obtaining town status in 2001 and nowadays presents itself as the region's town in growth. Good business conditions, developing trade and industry sectors make Lyngdal an attractive municipality for new businesses and enterprises, as well young families with children (lyngdal.kommune.no. 2016). Lyngdal municipality

appears in 2016 to be a proactive and innovative municipality. The municipality focuses on the well-being of its inhabitants and is oriented towards attracting new residents. Lyngdal municipality makes comprehensive efforts to develop an attractive labour market and favourable conditions for business. Recent reforms include comprehensive leadership development programs and a number of new cooperation initiatives. Lyngdal municipality is a leader when it comes to trying out new forms of cooperation between the private sector and external actors. An example is the case of Lyngdal secondary school, where both public and private sectors entered an agreement concerning the construction and maintenance of the school. In doing so, Lyngdal took on a new development implementation model, now known as the "Lyngdalsmodellen" and agreed to be the first pilot project for it. The municipal chief executive, Norman Udland, said the following in a speech: *"We must use our resources even smarter than we do it today" (Olsen, 2013).* Despite the municipality's strained economic situation, Lyngdal municipality manages to prioritize and choose the most efficient and effective projects, having a long-term perspective of results. Due to the current challenges with regard to limited funds and strained economic situation, the municipality requires innovative ideas and a high level of interplay between politicians and research, public and private sectors etc. The municipality aims at providing the same services, of the same quality, as other municipalities, by doing things differently. One of the goals is to achieve 20% effectiveness by using innovative measures and doing things in a smarter way (Olsen, 2013).

5.1.2. Formation of Lyngdal secondary school

Lyngdal municipality has a total of six public schools: four elementary schools, one secondary and one high school. There are also three private schools: one elementary, one secondary and one high school. However, not so long ago Lyngdal municipality possessed two public secondary schools instead of one, namely Å and Berge. The former Å secondary school was located some kilometres from Lyngdal centre, closer to the E39 main road. Å secondary school was located in the middle of the residential area, that gave a possibility for local residents to have school within walking distance. Former Berge secondary school was located in Alleen, in the centre of Lyngdal. Former Berge secondary school was in quite poor conditions and needed to be repaired. Two options were considered to deal with this problem. The first one was to build a new Berge secondary school and later to upgrade Å secondary school, by this retaining two schools. The second option was to build one big secondary school, by means of merging the above-mentioned schools. Politicians in Lyngdal considered this issue in 2010 and at the

first voting round decided to build a new secondary school as a replacement for Berge school. The majority of politicians voted for keeping the current school structure with two public secondary schools and agreed on building a new school in replacement for Berge secondary school. However, in autumn 2010 the decision was reversed shortly after the first voting round. This time the majority of Lyngdal politicians voted for building one large secondary school, having in mind a merger between Berge (180 pupils) and Å (130 pupils) secondary schools. As a result, a need for renovation of the former Berge secondary school, resulted in launching a process of creating a new school structure, merging Berge and Å secondary schools into a new single Lyngdal secondary school.

After having agreed on the decision to merger the two schools, the municipality's political and administrative authorities started looking for the ways to implement the project with a focus on quality, price and flexibility. Researchers from the University of Agder (UIA) by this time had worked out a new implementation model for the construction project. The model inspired and worked out by researchers from UIA was presented to Lyngdal politicians with a proposal to adopt it as a pilot project for building Lyngdal secondary school. The model constructors believed that the implementation model would fit well for the particular building project. They believed the model to be effective, fair, open for user's involvement and able to reduce future operating costs. The central idea of the model, early user involvement (teachers, pupils, parents) in the process of planning, that is now considered one of the main factors which led to the project's success.

Lyngdal municipality, innovative as they are, have decided to go for the model that in the end of the project was called for "Lyngdalsmodellen". Further the municipality has used a competitive dialog as a form for choosing contractors for project's implementation. In total five entrepreneur companies showed interest in the project. Based on the proposals presented, Kruse Smith and Skanska were chosen for further dialog. Finally, the offer of Kruse Smith was considered to be more economically attractive and was selected for further cooperation. Looking back, it can be observed that the project's goal to build the school that provided the lowest possible cost over a 50-year perspective has been achieved. The total price of the project turned out to be around 10 million NOK lower than expected. According to the contract, the cost saving related to the target price have been shared equally between the contractor and the municipality (Danbolt, 2013).

Following a long process Lyngdal secondary school was completed in August 2013. The school is located in the centre of Lyngdal, where the former Berge secondary school was situated.

Lyngdal secondary school was opened by the minister of culture in the beginning of the new academic year 2013. It currently entails 330-350 pupils and 54 employees. The school includes pupils from eight to tenth grade with four parallels per each grade and one introduction class with a varying number of pupils.

5.1.3. Project organisation

For the purpose of leading the project of merging two secondary schools and building a new school, a steering group was created. The steering group - is a decision-making body with responsibility for planning, projecting and implementing the project into life. The project group consisted of six members, half of whom represented contractor (Kruse Smith) and its partners (Asplan Viak and ERV). The remaining half, represented the municipality, the school's staff and users. Thus, the actors were represented equally from the clients and suppliers side. This means that the decision-making authority was equally shared amongst the key stakeholders. The project organisation can be seen in the model below.
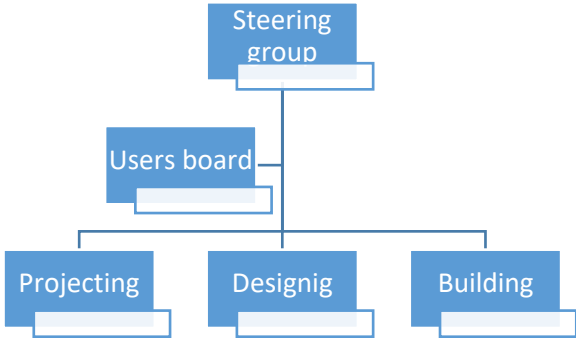
Figure 5: Project organisation

According to the contract undersigned between the municipality and the builders, municipality could freely choose between public or private financing of the project. Based on the economic calculations, Lyngdal municipality chose public financing with private operation of school. The contractor Kruse Smith has responsibility for technical operating and maintenance of the school during the first 5 years, with the possibility of contract extension. Lyngdal municipality is responsible for the operation of the school in terms of teaching and administration.

5.2. The background and key driving forces behind the merger between Å and Berge secondary schools

The purpose of the first research question is to look at the intentions that lies back the decision to merge two schools into the new one secondary school. In order to answer the question in a proper way, I would like to use the following questions from the interview guide:

- What was the background for merger in your opinion?
- Who came with the initiative about merging schools?
- What or whom were the main driving forces in the merger process?
- What were the main arguments for the merger?

Respondents answers on the first research question

Informants gave an overall impression that process started with an understanding that something should have been done with Berge secondary school, as conditions of the school were poor. Lyngdal municipal council wanted to explore the possibilities of how to handle the situation in the best way. The municipal council has announced a competition with an assignment to analyse the state of the building and come with a proposal of whether the school should be repaired and modernized, or whether it should be demolished and a new school should be built in its place. Respondent # 5, representing former Berge school, told:

"Basically, the political environment that had a majority said the following: "We do not know what we should do". They (politicians) asked for an investigation. As a result, they got two proposals from each of the contractors. Contractors have acquired skills separately and came to similar result."

Two building entrepreneurs came with their proposals and recommendations, after having analysed the old Berge school. The result of both proposals was to build a new secondary school for Lyngdal municipality. Both building entrepreneurs have concluded that demolishing of school is a better option than repairing it. They also had to consider if there some profits to retrieve by carrying out merging or any other change within the school structure. The results showed that there was an economic benefit by merging two secondary schools into the one unit. Respondent #7, representative of external actors, conveyed the following:

"We (external actors) made a study of the school structure in Lyngdal and it proved that it would make sense for the municipality to merge two secondary schools together. Especially with a focus on building a new school in case of merger."

Five out of seven informants draw economy as the main argument and the main driving force in the decision to merge schools together. Among other arguments for undertaking merger were: larger professional environment, better educational opportunities, larger environment for pupils that means more communication, better teacher resources etc. Respondent # 7 stated that:

"The purpose of this merger, in the perspective that we worked for, was a more effective and cheaper school per square meter or per pupil space, primarily per pupil space. Getting a larger group of experts with better educational facilities, as well as it was financial gain in merging the two schools."

Informants have all agreed that initiative of merger came from the political level. Municipality's administration, in its turn, was responsible for implementation and execution of the process. They were a part of the steering group and had to decide in cooperation with others on the upcoming questions during the process. The main driving force mentioned by respondents were: political decision to merge schools together and the coming economic benefits out of this. Respondent #5, representative of the former Berge school, mentioned in the interview:

"It is cheaper to run one school, in a long perspective, then to run two".

5.3. The role of leaders during the process of merge

To answer the second research question concerning the role of leaders, communication and creation of the vision in the process of merger, I would like to use the following four questions from the interview guide:

- Did leaders manage to create a good communication and information flow during the process, in your opinion?
- Was a good communication built between leaders and employees, you and your colleagues?
- Did leaders manage to create and communicate a clear vision for change?
- How could you describe the environment around the merger?

Respondents answers on the second research question

Informants perceived the process as orderly and fair that is one of leader's merit. Informant #3, representing the former Å school, conveyed the following on this respect:

"We had an orderly process both from political and administrative side. I have nothing negative to say about the process and information flow, everything was orderly".

Informants mentioned that there was a good dialog during the process of merger between leaders and employees. Informant #1, a member of the steering group, informed that all the actors involved received a full information on what was going on, and what were the expectations of the end result. In respect to the vision, whether leaders managed to create and communicate a clear vision for the necessity of change, opinions have divided. In total three of seven informants considered that a vision was created to some extent. One informant, representative of Lyngdal municipality, expressed himself as being uncertain if a clear vision was created. Respondent # 1 noticed that it was relatively clear in his head, but at the same time he could not know if the rest of the actors meant the same. Respondent #1 expressed the following:

"As seen from my side, so it was relatively clear in my head, that it was the right thing to do. But, whether there was someone else who thought the same. It will again depend on who answers on this question. I am quite sure that there are still some who would say "no" it was not created, while others would say that the idea was clearly stated."

From the majority of answers given on the question concerning the creation of the vision it may be stated that respondents would not call the process as being vision-driven. The reason lies in the fact that leaders did not manage to create the vision in the beginning of the process, as they did not know themselves what and how they wanted to do things. The only vision they had, was an understanding that Berge secondary school was in a poor state and something should have been done with it.

Communication and information flow during the process of merger

Informant #2 mentioned several rounds of open information meetings that were held for pupils, parents and for anyone who wanted to get some information.

"It was then informed about advantages and disadvantages of small schools and large schools, plusses and minuses about it. They were also oriented with the economic benefits, about how the school should look like, what offers would the new school have when merged."

The same meetings were held for employees from both schools. Employees were highly involved in the process with an ability to influence main decision. These facts point out clearly that school representatives were involved in the process, they knew very well the process and were well informed throughout it. The majority of informants mentioned engaged and easily accessible leaders. Furthermore, it was mentioned repeatedly that central leadership appeared to be enthusiastic and highly involved in the process.

On the question whether the process was perceived as being top-driven, the majority of the informants gave negative answer. One of the respondents, representing former Å secondary school, expressed himself:

"It (the process) was not top-driven in any way. I consider that we were involved in a good process and have been taken seriously, were consulted for various advises."

Further informant supported his opinion by telling about user's board which was created in order to enable representatives from both schools to be in involved in the process of merger.

"We were allowed to say our opinion about things, almost everything. How we wished building should look like, dialogue with architects, dialogue with builders."

As already mentioned earlier, a steering group was created as a main decision-making body. The steering group included representatives from both schools, municipality's representatives, contractors and the external supervisor. The steering group was regularly gathered on common meetings in order to discuss current issues concerning the flow of the process. On such kind of meeting all the parties involved in the process of merger had an opportunity to meet on the common "arena" in order to discuss, speak out their meanings and in overall control the situation. This clearly points on the involvement of different actors in the process of merger between Berge and Å secondary school. The involvement of all the stakeholders mentioned above supports an idea of building the right change environment, and building a good communication among the key stakeholders involved.

As a kind of contradiction to what is said above, here comes a statement from one of the informants, representative of the former Å school, which reveals a perception of the process as being top-driven. Informant #4 meant that the decision came from the top, as well as the process itself was operated and controlled by the political authorities. Informant stated that:

"It (the process) was agreed by them (politicians). We had very little we could say. And there was a conflict, because we thought as already mentioned, I repeat myself, that we had a well-functioning school (Å school), but we were not heard".

This statement shows that different perceptions, views and reactions took place during the process of merger. Different reactions and opinions, in respect to the merger between Å and Berge secondary schools, is the topic that I would like to highlight in the next sub-section.

5.4. Reaction towards the mergers between Å and Berger secondary schools

To find out about various reactions and attitudes that arose among the key stakeholders involved in the process of merger, both in its initial phase and during the process, I would like to make use of the following questions:

- Did you feel that different opinions and reactions arose among actors involved into the process?
- Did you experience a conflict, to some extent, during the process of merge?
- What were the main arguments against merger?

Respondents gave unanimous feedback on the first question, presented above. All seven informants pointed out that different meanings and reactions arose in respect to the upcoming merger. One of the informants, representative of municipal administration, stated that it is quite natural to have different opinions in such special cases. Municipal representative admitted that different opinions and reactions occurred among participants both before and after the process. In total five informants from various institutions (municipality representatives, school representatives, external actors) underscored that strong reactions and feedbacks were more evident from one secondary school, while the other one school was more neutral. Informant from the former Berge school noticed:

"In Berge, there were no strong opinions. I think a great part, also the majority in Berge, thought that there was no problem in merging. In Å school, I have got an impression that people felt that they lose the institution in their close neighbourhood and there was more resistance there. From Berge, there was little opposition to the merger."

It was noticed by the same informant that Berge was in poor condition, so a new school was needed in replacement for the old one. But the fact that the school will merge with the other one, came as an additional argument. In the case with Å secondary school, merging with Berge school, implied a risk to be closed down. That is why stronger reaction arose particularly in Å secondary school. Different meanings came from students, parents and teachers. Informant #2, representing Lyngdal municipality, expressed his view on this by saying the following:

"The new school was built on the place where one of the old schools stayed, so it was probably many who felt that a school was closed down, also moved into the other one. ... Those who moved, those felt that they were closed down, they protested both parents and students. They wanted to continue in the old school and expressed themselves as being dissatisfied with a fact that they had to merge."

Informant # 4, from the former Å school, gives an impression of being disappointed with the fact that his school had to be closed down. He conveyed that they knew about the upcoming change, they saw clear signs from the political authorities and to some extent were already prepared to this. However, he expressed the following:

"We felt that we had it nice up there (in the former school) and wanted to continue there."

Here come feelings of being connected to a working place, where the one has worked for years, tried to make the place better and suddenly had to leave it. As it was mentioned during the interview with the municipality representative: *"Such feelings should be taken seriously."*

Moving further to the question related to the main arguments that were mentioned against the merger. It is important to notice that arguments against merging came from different groups of teachers, pupils and parents. Still, parents seemed to be most actively involved of all groups. It showed out that some parents feared the upcoming change. Respondent #6, representing contractor company, said the following:

"They (parents) knew what they had, but they did not know what they are going to get."

Parents believed that the school is coming to be large and complex, that it will be difficult to keep an overview of the school, pupils may not be seen, bigger level of bullying will take place. Respondent #3 from the former Å secondary, noticed that:

"The fact that there is going to be a big school, for some is an argument in itself."

Some parents and pupils did not want to get a new school or being merged, they were satisfied with the school they had. Respondent underlines this with the following:

"There were good room facilities, nice outdoor area, close proximity to where they live, many such kind of things that made, they wanted to retain school."

Respondent #7, representing external supervisor, in his turn argued that:

"They (parents) wanted to keep the old Å school, so that children could have a short way to school and could avoid trip all the way down to the centre with all the temptations down there as buying beer or what could it be. They wanted to have them closest possible to their homes."

Longer pathway to the school was mentioned by six respondents as one of the main arguments that parents mentioned, with a hope to keep both schools. Respondent #4 stated that there was a very strong parental support in order to keep Å secondary school. *"People asked, why should we change something that works well? Why should one put down school that works well?"* Respondent stressed that Å secondary school was a well-established school, which showed academically good results.

To summarise what is discussed above, it may be argued that parents turned out to be more negative towards merger between schools, in comparison to pupils and teachers, who showed up to be more open and positive towards change. Parents tried to convey their opinion to the political authorities and municipality council by demonstrating. They made a physical ring round Å secondary school in support of remaining the school, this demonstration was highlighted in local newspapers. Though, parents tried to influence the process in its initial phase, after the decision was declared by the municipal council that the schools will merge, those who opposed the merger, has finally accepted it and remained loyal. After the decision was determined, both parents and teachers helped to build a good new school.

Considering the question whether respondents experienced a conflict during the process, the empirical data shows that opinions have divided. Two respondents meant that there were no conflicts during the process of merger, while five respondents consider that some conflicts appeared during the process in a smaller or larger degree. Respondents, who argued for not having any conflict, stated that the process was fair and open. One of the informants, representative of the internal actors, reported that he had not experience conflicts, but rather disagreements with current politicians and municipal council. The same argument was

mentioned by three other respondents, who consider that there were some disagreements during the process. Informant #7, representative of the external stakeholders, noted:

"Small conflicts are always there, but there were no conflicts that were not resolved between the partners. I would not call it a conflict either, but disagreement. Disagreement is what creates new ideas. So, it should be and it was there (in the process)."

Some conflicts arose in the initial phase of the process, as already mentioned above, resistance came from parents, teachers and pupils. This happened before the final decision, about merging schools, was announced by the municipal council. Respondent # 4 notes in respect to this:

"When the decision was announced and the merger was approved, I felt that I had only one goal and that was to stand on and do my best to make it a good school. "

Relying on the empirical data presented above, it may be argued that those who were negative to the merger in the initial phase of the process, performed loyalty and helped to implement the merger with an emphasize on good end results, after the final decision was announced.

An interesting situation, which I would like to mention, occurred with the politicians. Lyngdal political authorities, are those who have initiated the process of merger between Å and Berge secondary schools. They have called for the external help and have appointed municipality's administration in charge for leading the process of merger, by transforming them the powers for project's implementation and overall control. However, as it turned out at the end of the process, politicians express their dissatisfaction with the level of their involvement and influence during the process. It was stated by several interviewees that politicians felt themselves as being not enough involved in the process of merger, mostly they complained about the lack of the information and a small degree of influence. The main reason that can explain why this situation took place, is that completely new model for project's implementation was taken in use. Reffering to the implementation model, "Lyngdalsmodellen", politicians were not taken as central actors in the process, instead users, builders, architects and teachers were at the forefront of the process. The process was decided and controlled by these groups. Accordingly, politicians felt less influence, being less informed that created a conflict between politicians and municipal administration. Informant #1, representative of Lyngdal municipality administration, stated that:

"In a traditional building project politicians have a much greater degree of involvement in deciding how it should be done, how the building should look like. This model

("Lyngdalsmodellen"), involves primarily users but not the political level and it seems some politicians were not willing to accept this. So, it was a bit of a conflict between some politicians during the process, they felt that they did not knew what really happens, how was it going, what were the plans for the future."

The same respondent notes that they, from the steering group, have tried to convey the information constantly to the political level, by making reports, sending in current information. But as it turned out some politicians still considered it to be not enough. Respondent #7 representative of the external actors said the following:

"What we have received as a negative feedback, is that politicians were not involved enough. They probably wanted to have senior management with strong involvement of them. But we were aware that this is not politics it comes about, the subject is education, architecture, building techniques. It is not politics, what we do… We had some conflicts, that they (politicians) tried and wanted to have a greater role and influence, but were kept below."

5.5. The role of external actors in the process of merger

The last research question is oriented on answering questions about the role of external actors in the process of merger. Lyngdal municipality decided to go new and untried roads by adopting new implementation model and choosing public-private partnership as a form of cooperation. To find out why such a path was chosen, I would like to look closer on the following questions:

- What was the main focus of taking in use public-private partnership model?
- What type of implementation model was chosen for carrying out the process? What is the main focus with it?
- How could the interaction between external and internal actors be described? Was a "common arena" established for the dialog between the actors involved?
- Does this form of cooperation succeed in achieving its goals, in your opinion?

Public-private partnership

Three of seven respondents believed that the choice of public-private partnership (PPP) came from the political level. Respondent # 1, representative of Lyngdal municipality, noticed:

"It was largely a political signal we received from the political authorities, that they wanted us to examine whether it was appropriate to use PPP. So, some of the political leaders had great faith in PPP and they (politicians) wanted us to try and see, if this is something that can be implemented as a PPP model."

Respondent #2, representative of the municipal administration, has mentioned the following:

"Most likely it was a political choice. It was not the municipality's administration, who said that we choose PPP. But it was municipal council who said that now we are going to try it."

Considering this it may be seen that both respondents consider politicians, as those who suggested PPP as a form of cooperation. The main argument for the choice of PPP, mentioned by the respondent #2, is that politicians believed that contractors could do it much better than municipal workers. Politicians believed that the process and its results are going to be better if builders are allowed to participate and influence the process from its initial phase.

Respondent # 7 saw some other factors that were critical for the choice of public- private partnership. In his speech, respondent emphasized the following:

"The main purpose was to achieve early involvement of all parties concerned, also cooperation from day "A". Open up for larger user interaction, which you do not get in a turnkey project."

Further Respondent #7 noticed that the main expectation for the PPP was flexibility. By the flexibility is meant that the municipality stayed relatively free in the terms of choice. This implied that the municipality could take and change decisions during the process. Municipal council could choose in respect to such aspects as: whether they would rent the school from the contractors, whether the contractor or the municipality would be responsible for school's maintenance etc. All these decisions could have been taken during the process. The steering group, in its turn, wanted to get and study all the possibilities from the market, all alternative concepts, alternative building plots and alternative financing forms. By means of announcement of competition among contractors and by analysing their propositions, the steering group managed to highlight all the following questions. Respondent # 7 conveyed:

"We have discussed all these things and to shed the light on these, implies that you avoid coming to it later in the process with a need to change something, so we managed to avoid it."

Implementation model "Lyngdalsmodellen"

Speaking about the implementation model that was named afterwards "Lyngdalsmodellen", I would like to notice that I received more complete information from the external actors, namely from the contractor, Kruse Smith, municipality's administration and the external supervisor. The reason for this, should be the fact that the model was worked out by the external actors and as a result, they were more aware of it. Schools representatives turned out to be less acquainted with the model, however some of respondents have expressed their general impressions of the model. Respondent #5, representative of former Berge school, noted:

"At least one thing I am sure about is that I cannot imagine a model that leads to a greater extent of user engagement ... I was really involved in the process. I have decided how things should be like. It was a very high degree of user involvement. I consider it (user's involvement) to be one of the best parts with the model."

Further, respondent #5 underlined that the implementation model was a well-balanced and good model. During the interview, the respondent noticed that the model is particularly suitable when the one does not know what s/he wants or what is the best way to go. By obtaining external help it is easier to get a better overview of all the possibilities. This makes the process being well considered, highly controlled and rationally driven by mutual efforts of both external and internal stakeholders.

A total of five informants, four representing external actors and one representing former Berge school, have mentioned cooperation, high degree of user involvement, effective economy and project's flexibility, as the main priorities of the implementation model. Respondent #2, representative of Lyngdal municipality's administration, on my question about what was the main focus in the model, answered the following:

"It is interaction and user involvement, those who will use the new school. The user must be very central also decide on the most issues, defining how the school should look like, how should the school be like as for the teacher or student."

Respondent #1, from the municipality administration, told how the model was chosen and what were the main aspects within it. First, the respondent has emphasized that the main feature that distinguished this form of cooperation from the traditional form of contracting, is that there was a close interaction between the municipality, which initiated the project and the contractors, those who built. Respondent further told that in traditional form of contracting draft drawings are first delivered as a suggestion on how the building should look like and after that, it is up to the municipality to decide whether they want to adopt the project or not. In the case with Lyngdal secondary school, contractors were chosen out of different criteria. Respondent underlined that contractor was chosen without any previous drawings or drafts. The municipal council had announced some basic demands concerning the number of the pupil's places needed, school's flexibility, implying that it should be relatively easily to rework or extend the school, if needed. These requests were conveyed to the contractors and they, in their turn, came with proposals on how the school could look like. It was up to contractors to consider whether Berge school should have been renovated or whether a new one should be built on its place, or

whether it made sense to merge two schools together. Contractors could suggest all these, but the final decision was up to the municipal council. The choice of contractors and their proposals were also considered out of some other criteria, where the main focus was oriented on competence, quality and price. Respondent #1 conveyed the following:

"In this way, the contractor was chosen and the drawings have started. They started to draw what it should look like, but then in very close cooperation with us (municipality), with users first and foremost, with teachers and other parties involved."

This tells about the well-arranged interaction and communication between actors involved into the process of merger. In addition to this, respondent # 7 mentioned the following:

"The main focus of this model, is an idea oriented on partnering. Where we tried to get all the key players very early on the path so that architects, consultants, engineers, contractors, users and project owner could cooperate on both defining what school should include, concerning technical requirements, logistics and all things like that. While they also cooperated on finding solutions, also implementing all this, so that we all together agreed on the solutions adopted. That is how we avoid getting constant changes during the process, that would cost much more. This is an important element of the model."

Further, respondent # 7 mentioned the central role of user involvement, importance of cooperation, focus on building multifunctional and flexible school, focus on efficient economy and quality in school's life perspective.

"We have a strong focus on user influence, user has a strong force in this model. Usually there is an architect and engineers, who decide mostly in turnkey contracts, but here we have a very strong emphasize on users, so that they can influence both the requirements and solutions. Further, we think long-term in this model, we have announced that it should be built as flexible, also its physical part, that it could be expanded or shrunk adapted to new educational requirements. Multi use capabilities so that it could be used to completely something else in the evening, is an important element in this. We have also focused on efficient economy in lifetime perspective. This will say that we downplay what it should cost per square meter to build and we are looking at its live time costs: the sum of investments, operation and maintenance, energy use, cleaning etc. All this in fifty years' perspective that we are trying to minimize costs."

Informant # 7 mentioned also two possible options in the following model. The one with private financing and private technical operation of the school, so that it would be a more traditional

form of PPP. The second one is with public financing and a possibility for private maintenance of the school, that is not a pure form of PPP, but is still optimal choice in some cases. In the case with Lyngdal secondary school, the second option was chosen. According to the information I got during interviews, the decision about public financing and private maintenance was announced at the end of the project. The idea behind this was, to a certain extent, to keep the tension and at the same time to control the quality of the works delivered. If contractor would know from the beginning of the project, that Lyngdal municipality is going to take maintenance of the school, they could have delivered lower quality of building, than if they would operate the school themselves. As for public financing, the majority of the respondents interviewed, have mentioned that it was the best solution seen from the economic side. Respondent # 2 stated the following in respect to this:

"It was considered that the project could be financed privately. Then we saw quickly that it would be more expensive, because municipality could borrow money cheaper than the private actor ... That is why it was a purely economic consideration, which meant that we chose to do what was most favourable in relation to payment."

Interaction and dialog between internal and external actors

During the interviews informants mentioned that there was a good dialog and interaction between the actors involved in the process, between external and internal actors in particular. It was mentioned repeatedly about open and clear process with a focus on common goal and ensuring good cooperation for achieving it. Respondent # 7, representative of external actors, noticed the following:

"The interaction between the municipality's employees and users, contractors and consultants worked very well. We have done an assessment on it, and have got a very good feedback."

Respondent #1, representative of municipality, stated that there was a good interaction and high degree of agreement between the municipality and contractor. Further he conveyed that they have got a feedback from the contractor, after the projects was completed, that those were very satisfied with the level of interaction as well. Respondent #6, representative of the contractors, during the interview has noticed that Lyngdal secondary school has been a "fun" project to be involved in. Both builders and architects have expressed their meaning at the end of the project, that this has been a project when they were quite frustrated at times during the process, when speaking about changes and new suggestions that came constantly during the process. But at the same time this was a project, where they had learned most and were highly satisfied with

the final results. The contractor, talking on respect of himself and partners, told that this was a very exciting way to work at.

In order to keep a good dialog and cooperation some "common arenas" were created for steering group meetings. Such meetings were held for keeping parties updated with current issues and as a place where such issues could be discussed and agreed on. Respondent #7 informed:

"We had many common arenas. We had progress meetings, where we examined various technical work, system selection, many practical matters in logistics and so on. And these happened in group work, where users and contractors and consultants and sometimes builders worked together. We had planning meetings, where users and builders were involved in advising contractors and created solution and ideas on how this should be designed. We had a project board, a steering group, consisting of three representatives from builders and users and 3 from consultants and contractors, which is a decision-making body. And supervisor to ensure that both interests, all interests are best possibly safeguarded. Many joint meeting arenas."

In addition to the above mentioned, respondent # 7 added that on such joint meetings partners worked together in order to set common goals and after having declared such, they have worked hard to achieve those goals. Respondent mentioned great loyalty towards the overarching goal.

In total respondent gave an impression that during the process of merger between Berge and Å secondary schools, partners managed to achieve a high level of mutual understanding, good cooperation aimed at achieving common goal. However, it was also mentioned by two respondents that some disagreements took place during the process. Respondent #5 told about disagreements that came from the political side, when some political parties were sceptical towards PPP model and wanted it to be a traditional model. Respondent #6 suggested that disagreements always take place, but there were no such big misunderstandings that could not be solved by means of discussion or dialog between partners.

The last interview question asked during the interviews, concerned respondent's opinion on whether the project succeeded in achieving its goals. All seven respondents concluded that they are satisfied with the model ("Lyngdalsmodellen") being used, the form of cooperation (PPP) and the end results achieved. Evaluations that were carried out by University of Agder, after the new school was taken in use, showed positive feedbacks as well. Still almost all informants mention some disadvantages or imperfections within the project. The majority of such comments concerned technical part of the building. It was mentioned by school employees that the new established Lyngdal school risks to be too small in future. In case if the number of

pupils will increase at least with thirty pupils, a problem with a lack of pupil's places may occur. As a result of two political voting rounds and late involvement of Å secondary school into the process merger, there is a possibility that building's flexibility in relation to its expansion has been already used. Contractors have also mentioned some technical problems with energy system, that did not work as it should. Thus, there are some changes and improvements to be made, but in a very small quantity.

Back to positive comments, it was noticed by respondent #1, representative of municipal administration, that he has got feedbacks from different groups of stakeholders after the project was completed and Lyngdal school was taken in use. Some teachers, parents and pupils, who were primarily negative towards merger, came to him as to the representative of the steering group and municipality's representative and told that it was the right decision to take. Respondent #1 noticed the following:

"I cannot say for everyone, but I have received some feedbacks from parents, student's groups and teachers, who came to me afterwards and said that it was right that it has been to one school. After the process was completed and the school was taken in use, they found that the school was not as big and dangerous as they might have thought."

Respondent #3 and #5 representatives from earlier Å and Berge secondary schools, mention that there were no problems with merging of two cultures of two different schools. Respondent #3, from the former Å school, notice:

"I think we have done a lot of right, because the process went almost painlessly. In addition, it was a very good process, in which one seldom spoke as Å or Berge, now we are Lyngdal secondary school. And this was almost from the very first day."

To sum it up, despite the disagreements that were mentioned during the interviews, I may conclude that partners are mostly satisfied with the process and the results achieved.

6. Analysis

The analysis consists of the explanatory part of the research question and is based on the theory and empirical data chapters presented above. The analysis will basically present insights based on the four main dimensions outlined in Jacobsen's conceptual model: the change drivers, the change context, the change content and scope, and the change process. The conceptual model serves as a conceptual and theoretical framework for the analysis of the process of merger. The model has been useful to see a complete picture of the change process. The conceptual model provides insight into how complex the change process is and how different factors play a big role in respect to decisions and outcomes. However, the model seems to be insufficient to study all the key aspects within my research question. That is why some additional theories and analysis of the role of external actors by use of public-private forms of cooperation and the role of leadership as critical success factor are added in order to complement the model and enable answering the research question.

6.1. The driving forces

What makes an organization break out of its stable state and begin a process of change instead? In order to answer this question, it is essential to understand what is it that drives change – what are the driving forces. Harman and Harman (2003) emphasizes that mergers may have various driving forces or as Van de Ven and Poole (1995) define them "motors" for change. The driving forces may have different backgrounds and may come from various sources both inside and outside the organization. A driving force can be anything from specific individuals, local initiatives, or national reforms. According to Jacobsen (2012) the driving forces may be divided into internal and external ones. Internal driving forces refer to the internal relationships within the organization, while external driving forces refer to environmental conditions.

Results from the empirical data collected show that the main driving forces that were mentioned by the majority of informants were the political decision and the economic efficiency of merging Å and Berge secondary schools. The decision on merging schools came as a result of the public authority's initiative that may be argued to be an external driving force. During the interviews, it was also mentioned that it is cheaper to run one school than to run two. Thus, the economic benefit of establishing one secondary school instead of two, may be seen as another external driving force in the process of merger. Political authorities from Lyngdal municipality

considered the merger between secondary schools as a possibility to establish a new, better school, with better educational facilities, as well as providing the possibility of saving money in the long perspective.

As for the internal driving forces in the case of Berge secondary school, the need for change came as a result of problems that required an immediate solution. From the interviews, it was revealed that the physical state of Berge secondary school was poor and some informants have argued that it was a critical time for Berge. The following correlates with what Kotter (1995) calls "the sense of urgency". The situation when the threats are evident and the consequences of not changing are clear. In such a situation, it is more likely that the majority of actors involved will agree with the necessity for change and will be willing to help and contribute in implementing the particular change. However, in the case of Å secondary school, there was no clear or evident need for change. On the contrary, the school's staff, pupils and parents were quite satisfied with the school. Å secondary school was described as a well-established school, showing good academic results. What is more, parents were highly satisfied to have the school in their district, close to their homes. This, later, became one of the main arguments against going ahead with the merger. The school needed some renovation works to be done, within a certain time, but otherwise no critical necessity for radical change was felt or observed. In other words, the feeling of urgency was absent within that particular school and this may explain the resistance that occurred within Å secondary school. I am going to discuss this in more detail further in the analysis, under the sub-chapter about the process of change.

Among other external driving forces that should be mentioned are changes that happen within the external environment, in the educational sector. As already mentioned in chapter two, regarding reforms within the school sector and higher educational sector, the educational sector was subject to radical changes, reforms and mergers during the previous decades. Mergers within the educational sector have been a common issue both in Norway and internationally. An increasing number of institutions merge together, pursuing such goals as: stable and strong institutions, economy efficiency, stronger academic programs, and improved student services (Skodvin, 2014; Harman and Harman 2003). Accordingly, constant change and increasing globalization in modern society make it necessary for the institutions to change themselves, in order to adopt to changes and survive tomorrow's challenges (Burke, 2002).

Jacobsen (2012) describes driving forces as such that may be characterised as clear and unclear, strong and weak. The clarity of the driving forces depends on the number of people that agree about the same thing. The strength of the driving forces strength, depends on the actor's perception of the driving forces' importance and what kind of impact they may have on the organization. Thus, the driving forces may be seen as ideas with different degree of clarity and strength. As has already been mentioned in the theoretical part, the driving forces' clarity and strength have a great importance on the opportunity of implementing change.

The driving forces in the case of the merger between Å and Berge secondary schools may be characterized as clear and strong. However, the driving forces within Berge may be characterized as being stronger than within Å secondary school, at least at the beginning of the process. Å secondary school was not involved in the process from its beginning and it was namely Å secondary school which was resistant to the process of merger and tried to stop it during its initial phase. However, as a result of a number of open meetings held on behalf of the merger between Å and Berge schools, the users (teachers, pupils, parents) were convinced in a greater number of the advantages in case of undertaking merger. The users' perception of driving forces clarity and strength, was enhanced by Lyngdal municipality politicians, as a part of organization's regulative environment (Scott, 2008), that have been behind the decision of merging.

Among other drivers that were mentioned by interviewees in favour for the decision to merge two schools were: larger professional environment, better educational opportunities, better teacher resources, larger educational environment for pupils. The driving force of better educational opportunities, corresponds with *increased efficiency and effectiveness of educational institutions,* which is one of the important drivers of change described by Harman and Harman (2003). The larger professional and educational environment, corresponds in its turn with *improved student access and greater differenced in courses* (Harman and Harman, 2003). This again supports the idea of clear and strong driving forces in the process of merger between Å and Berge schools.

Van de Ven and Poole (1995) define the four different categories of driving forces for change as: the planned change, change as a lifecycle, change as evolution and change as a dialectic process. Jacobsen (2012) added a fifth category which he called the anarchic change, based on coincidences. The case of merge between Å and Berge secondary schools may be characterized

as the planned change process. The following change approach is based on a perceived need for change. The main driving forces in the planned change are people's subjective perception of the need to change. That is to say that a person or a group of people – change agents, come with their objective interpretation of the current situation and propose certain solutions for its improvement. Accordingly, intensions are the main driving forces in the planned change and by means of change it is expected to achieve certain goals. In the case of Å and Berge secondary schools, local political leaders in cooperation with the municipality's administration may be defined as the change agents in the process of merger. These actors have analysed the situation and worked out the solutions for its improvement. The process of decision making has undergone the four phases described by Jacobsen (2012):

The diagnosis of the situation – recognition of problems and of the need for change. The bad condition of Berge secondary school and the need for its renovation may be seen as the starting point of the change process.

Solution – figuring out the measures that will solve the current problem and bring the desired results. It was decided to apply for external help and to implement structural change by means of a merger between Å and Berge secondary schools, as a measure for efficiency improvement and economic savings in the long-term perspective.

Implementation of undertaken measures – planning and organization of the change process. The implementation model lately called "Lyngdalsmodellen" and public-private partnership as a form of cooperation for the project's implementation. The steering group, which consisted of equal number of representatives from the contractors and from the municipality and schools' representatives, was created for operation and maintenance of the whole change process.

Evaluation - evaluation of the process and the results achieved. The evaluations that were carried out by the University of Agder, after the new school was in operation showed positive feedback from satisfied pupils, parents and school employees.

6.2. The change context

Institutions do not act in a vacuum, but within a specific context. Context may be defined as a complex interplay between various local, regional and national stakeholders (Cai, et al., 2015). An institution is subject to both an internal context (organizational level) and an external context (organization's environments). The external context constitutes the organization's

environment, market environment and external stakeholders. The internal context consists of organizational structure, culture and people within the organization. In order to realise whether the change will succeed or not, within a specific organization, it is essential to specify the context or the frames the organization is located within. The sum of internal and external context determines how easy or difficult it may be to implement change. According to Cai (2015), mergers depend on how well the external and internal environments are balanced.

6.2.1. Internal context

The ability to change appears to be closely tied to how organizations are structured and what kind of organization we are looking at. Organization consists of environments, structures, culture and people (Jacobsen, 2012). All these contribute to make the organization unique. Some organizational structures make it more difficult to implement change, while others simplify the process of change. Accordingly, the type of the organization, its size and age will play a key role in how easy or difficult it will be to implement change in the particular organization. As for the rational for merger, at the organizational level the internal motivation for merging is to achieve economies of scale, administrative efficiency and academic benefits (Pinheiro et al., 2016; Harman and Meek 2002).

According to Christiansen (2007), schools may be characterised as public organizations that act in complex social and political networks. They are formally owned by the state authorities and are governed by democratically elected politicians. Schools, as public organizations, are multifunctional and are accountable to a number of actors and institutions. Thus, schools may be described as such, with strong connections with the municipality at the bottom and the state on the hierarchical top (Helgøy, 2006). These factors underline the importance of strong collaboration between schools and municipalities, schools and regional authorities, schools and state and/or Ministry of Education. This also says about the difficulty to implement change in such type of organization. Schools as organizations must respond to the expectations of different actors in society, while they must balance their own values. Schools should adhere to and deal with a big number of different actors, who have different demands and expectation which should be negotiated and agreed between them. However, Tronsmo (2012) states that much of the powers have been given from the state to municipalities, and again from municipalities to the school principals. Thus, much of the responsibilities and powers were transferred from the central government to local authorities. Still, the Ministry of Education is responsible for control and quality of the education system.

The case study of this thesis is the process of a merger which took place between two public secondary schools, located within the same region and the same municipality. The institutions were approximately the same size. Both schools may be specified as professional bureaucracies, characterized by constant routines, fixed rules and procedures, and clear division of labour. Such types of organization are known to be highly specialized, with horizontally built structures, often with small representation of administrative staff and large operational cores (Mintzberg, 1981; Christiansen, 2007). Professional bureaucracies can also be characterized by much of the formal powers given to the operational core. In the case of schools, powers are given to teachers and specialists. The operational core of both schools had their view on the current situation and according to Jacobsen (2012) could significantly influence it. The opportunity for the administrative management or change agents to implement change in the professional bureaucracy is small unless management gets support from the operational core (Jacobsen, 2012). In case of former Berge secondary schools, teachers were relatively passive since their main objective was to get a new school and it was quite the same for them, whether it will be one or two schools. In the case of Å secondary school, the operational core was more active and tried to oppose the process of merger by means of open protests and conveying their opinions to local politicians. However, after the decision about merging was taken and approved by political authorities, teachers and pupil's parents from former Å secondary school showed loyalty towards merging and tried to contribute for building a good new school.

Schools as educational institutions are basically organizations with weak connections internally. Karl Weick (2001) defines such kind of organizations as being "loosely coupled", where employees and departments do not influence each other that much. Although they work within the same institution, they have loosely coupled relations, because of the significant difference in work obligations and responsibilities. Jacobsen (2012) notice that organizations with close links between different sub units, change more quickly and comprehensive than loosely coupled organizations. It may be more demanding for leaders to implement change within such types of organization. Leaders should build a strong common identity among the departments, so that employees will see the necessity of change. This may be argued to be one of the challenges, that change leaders had to take into account and had to deal with during the process of merger between Å and Berge secondary schools.

6.2.2. External context

The external context consists of organization's external environmental conditions. In this thesis, I study the merger involving two institutions, that means two external contexts, thus increasing the complexity surrounding the change process. The external context may be presented by means of the environments the organization is located within, the institutional and technical environments. According to Jacobsen (2012) institutional environments are seen as such that maintain stability and counteract change. Institutional environments refer to stability, normative and cognitive conditions. Technical environments include matters affecting organization's performance, for example, access to resources. Thus, different environments allow change to a lesser or greater degree. Å and Berge secondary schools were located within such external environments where there has long been a positive attitude, from central government, local authorities and external actors towards merger within the education institutions.

As already mentioned above, decisions are not taken in vacuum internally in the organization. The relationship with the environment plays a central role in the decision-making. The external environments are the external conditions in which the organization is located and must adhere to. Accordingly, mergers within educational institutions often represent responses to institutional and technical environmental pressures (Goedebuure, 1992; Pinheiro et al., 2016). Institutions change in order to adapt to new market and be better prepared for the new environmental challenges. Thus, merger may be understood as an organizational response to changes within the institutional environments. The decision to merge often follow national regulations and economies of scale (Pinheiro et al., 2016; Harman and Harman, 2003). In many cases, the institutions involved expect to increase resources and/ or gain a more competitive position in the market (Cai et al., 2016; Goedebuure, 1992). According to Meyer and Stensaker (2011) different organizations have different capacities to absorb impulses from the environment and adopt to them. The main challenge for public organizations is that they do not operate within the market. Accordingly, impulses and feedbacks from the market are absent. That makes it difficult for public organizations to present clear arguments for change and arises a problem of common perception that the change is needed. Geschwind (2016) emphasizes that survival and growth of an organization largely depends on its ability to response on various demands and challenges coming from the external environments. Relying on the empirical data, it may be stated that in the case of merge between Å and Berge schools, local political

authorities managed to define and "translate" impulses from the external environments and took necessary measures to find the best solutions in order to address current challenges.

According to Stensaker (2005) in a number of reforms within the education sector public authorities appear to be initiators of the reforms. Educational institutions, as a part of a hierarchical management chain, are required to implement reforms adopted by the government or local authorities, as reforms or changes initiated by public authorities contribute to increased legitimacy and a greater pressure to undertake the reform (Stensaker, 2005). The case of merger between Å and Berge school, may be argued to find itself in the following category, where the merger was initiated by local politicians. Accordingly, schools were to some extent obliged to adhere to change initiatives and follow political regulations. Through the empirical data collected, the informants clearly point that municipality's management wanted the merge to take place and have played a decisive role in implementing merger between Å and Berge secondary schools. Therefore, the merger between Å and Berge schools may be seen as such that carries an involuntary character. Where, according to Skodvin (1999) and Harman and Harman (2003), the merger is initiated by the external actors, in our case local politicians and municipality's administration. Results from the interviews show that some informants regarded the process of merge as being top-governed. The reason for such perception was that the decision about merging was taken on the political level, that is why the process was seen as top-driven. However, on the contrary to this opinion the majority of informants did not see the process as being top-governed, because of the high level of actor's involvement. The following shows that different views took place among stakeholders involved into the process of merger.

6.3. The change content and scope

The content of change refers basically to what is changed, the scope of change defines to which degree is it changed. The type of the organization where the change take place and type of environments it is located within will influence how extensive the change is going to be.

6.3.1. The content

In response to the economy, as the main driving force for the change process, politicians choose merger between two schools, as a solution to save budgets money. An interesting question

following out, is what happens with the organizational structure? Jacobsen (2012) emphasizes that during the organizational change some modifications of structure, strategy, culture and tasks take place. The content of change will depend on the way the institutions are integrated and thus will define the adjustments needed. In the case of two secondary schools, that merged into Lyngdal secondary school, a form of total integration took place. The organizational structure has been changed, as a result of merger between two independent, institutionally equal organizations. According to Goedegebuure (1992), this is a horizontal type of merger, the one that takes place between two equal institutions, operating in similar academic fields and oriented towards similar type of product. The particular merger case may be also defined as a type of consolidation, which according to Harman (1991), implies merger between two institutions of equal size, where the participating institutions lose their autonomy and are transformed into a new single entity. Two former schools have been reorganized and were both included into the new one school, that lead to the bigger teacher and administrative staff and to the need of two different organizational cultures to cooperate together, as parts of a new organization.

Jacobsen (2012), suggests formal (structure) and informal (culture) organizational elements that should be taken into the consideration during the process of change. The changes in one of the organizational elements may lead to the chain reaction, where other elements may change as well. This will say that change in procedural routines or educational techniques (structural element), in the case with educational institutions, may lead to change in the central values, that the whole organization is based on (cultural element). According to the data collected during the interviews, respondents gave an overall impression that there were no problems with merging two cultures of two institutions into the new one. From the empirical data, it reveals that nearly from the first day, after the schools were merged, school employees and pupils started to associate them as members of the new Lyngdal secondary school, no longer Å or Berge schools.

6.3.2. The scope

Jacobsen (2012) defines organizational changes as such, being of different scope. Some changes are more dramatic and represents a break with the past, while others are more of adjusting nature and may be seen as further development of the way the work was performed earlier. The scope

of change is about how big the change is, whether it happens gradually over some period of time or rapidly. Thus, it may be divided between change as development and radical change. Out of this definition, the change undertaken in the case of Å and Berge secondary schools may be defined as radical change, rather than a development within existing frameworks. The educational structure in Lyngdal municipality was reviewed and redesigned, by means of reducing the number of public secondary schools. The following decision was again supported with an economic argument of saving money by running one school instead of two. Merging two secondary schools should thus meet the political demand of creating good educational facilities, increasing effectiveness of educational institution, providing greater courses difference and improving student access.

In order to meet the political decision of building a new secondary school and merging two schools into one, some strategic decisions were undertaken. The task and major responsibilities for steering the project were given to municipal administration. Who in their turn had to find the most effective and efficient forms of cooperation for organizing the building project with a focus on efficient economy in lifetime perspective. This will say that politicians have authorized the administration in choosing the main external partners (contractors, advisors), choosing the project's implementation model and in total controlling and deciding over the process of merger. Still politicians wanted to have an overall control and overview over the process, with a remaining right of influence. And as it was concluded at the end of the project, politicians were not satisfied with the degree of their involvement and awareness of the project.

Another important aspect of the strategic decision being undertaken, was taking in use quite a new form of cooperation, public- private partnership, and taking in use a completely new implementation model, Lyngdalsmodellen. Having considered the building proposal presented by the main building entrepreneurs and the implementation model that was worked out and presented by UIA researchers, the choice was made for taking in use public-private partnership as a form of cooperation and taking in use new implementation model, lately called as "Lyngdalsmodellen". These decisions can be called as strategic one, as they have built the foundation for further cooperation and project implementation.

6.3.2.1. The role of the external actors

In order to highlight the role of the external actors in the process of merger between Å and Berge secondary schools, I would like to refer to the form of cooperation that was chosen for implementation of the particular merger, namely public-private partnership. Public-private

partnership (PPP) implies cooperation of public sector organizations with other public sector or private sector organizations in order to provide services and goods more effective, in shorter time and having in view saving money and resources. According to Klijn & Teisman (2000), PPP can be defined as cooperation between public and private actors with a durable character in which actors develop mutual products and/or services, and in which risk, costs, and benefits are shared.

The confederation of Norwegian Enterprise (NHO) in their publication "Public-private partnership: alternative tools for addressing important social issues" (2014), points out the necessity of the modern society to address current difficulties by means of new thinking and innovations. Public infrastructure is becoming weaker, while the financing for renovation or building new infrastructure is getting harder to provide. The public-private form of cooperation is a good solution in such case, where cooperation between public and private actors is built on mutual trust, open communication, common goals and shared vision. In the traditional implementation models, public sector is responsible for financing, operation and maintenance of the infrastructure. Where the private actors are suppliers with limited responsibilities, taken in just for a limited time for executing a particular part of work. Accordingly, the private actor does not care any overall responsibility for planning, building or maintenance of the particular building. However, in the case of PPP, the whole lifecycle of an organization which include planning, engineering, construction, operation and maintenance period is seen as private actor's responsibility.

In the case of building the new Lyngdal secondary school, as a result of merger between Å and Berge schools, the innovative thinking and innovative ways of constructing were applied. Lyngdal politicians came with the proposal to examine and try out the new form of cooperation for building projects. The majority of politicians believed that early involvement of all the stakeholders concerned (external and internal), would provide effective cooperation and efficient economy. They were confident that early involvement of contractors would assure better planning process, that will further result in reduced time and money expenses.

According to the NHO publication (2014) the PPP may be constructed with or without public financing. In the case of public financing, the private actor is liable for planning, building, cooperating with other suppliers, while maintenance and financing are coming from the public actor. The contract in this case is called DBM (O) (design, build, maintain, and operate). In the case where the private actor has liability for financing the project, the contract is called DBFM (O) (design, build, finance, maintain, and operate). The private actor in such type of contract is

responsible for financing designing, building and maintenance of the project, in the timeframes agreed by the parts. The contract is usually undersigned for 20 – 30 years. The public actor is responsible for designing of a goal and defining a scope of the project. This will say that the public actor, in my case municipality, will describe the expected end goal and end result of the project. The task of the private actor is to implement the project into the life on the most effective manner as possible.

Lyngdal political authorities in cooperation with municipality's administration decided to go for the public financing and private maintenance of the school. The following was announced closer to the end of the building works. The decision to announce the following, nearly at the end of the process, came from the municipality authorities in order to assure the quality of the work delivered by contractors. The contractors did not know until the end of the project, who would to take the responsibility for the school maintenance for the next 5 years. That made contractors to be interested themselves in delivering a high-quality service, on the right time and with possible cost savings.

6.4. The change process

The research question of this thesis is aimed to study how a merger process between Å and Berge secondary schools may be assessed and interpreted. Accordingly, the change process is the key aspect intended to be studied in this thesis. The change process has been defined as the dependent variable, in this thesis, that is believed to be influenced by and closely interconnected with the other four independent variables: the driving forces, the role of the leaders, resistance to change and the role of external actors. The following are the key four aspects intended to be studied in order to assess and interpret the process of merger. The two aspects (the driving forces and the external actors) have already been analysed in the sub-subsections above. The remaining two (the role of the leader and resistance towards change) are intended to be analysed in the following sub-section. The role of the leader and communication as critical factors for successful change will be partly analysed in the light of Kotter's (1995) concept of leading change. The support for and resistance to change, and degree of participation will also be analysed in order to provide a complete picture of the merger process.

6.4.1. The role of the leader

The change leaders have the central role in creating clarity for the need to change by creating support structures and communicating, horizontally and vertically, the way forward (Kotter, 1995). The process of merger, as type of organizational change, entails significant managements and leadership challenges and the lack of leadership may lead to resistance. According to Stensaker and Kyvik (2005) in those cases where leaders succeed in conveying a clear vision and well specified plan for the merger and are able to communicate the guidelines of how the change will be managed, the level of resistance and stressfulness associated with the change will be significantly reduced. Thus, a successful change process is above all characterized by visible and strong leadership.

Stensaker and Kyvik (2005) emphasize that a merger process requires engaged top managers, who are willing to contribute considerable time and attention. Through the empirical data collected, the informants clearly indicated that the municipality's management had been highly engaged, enthusiastic and easily accessible during the process of merger. The process led by them, was described as orderly and fair. Good communication and dialog during the process had a great positive influence on the school's employees, the pupils and their parents. Jacobsen (2012) emphasize the role of actors' involvement in the process of change. The author further states that attitudes may change over time as actors get more information and feel themselves more involved in the process of change. Such perception coincides with the procedural justice perspective described by Tyler and De Cremer (2005). This perspective, outlines that even the employees who oppose the change are more likely to accept it when the process is perceived as open and fair. The empirical findings point out that attitudes of the actors involved have changed with their involvement and with their better acquaintance with the merger process goals and expected outcomes. Especially in the case of Å secondary school, the attitudes of teachers, pupils and parents changed and became more positive towards merger as their involvement into the process increased.

Cai (2015) underlines the role of empowerment of local actors (e.g. academics) in appropriate areas as managers of the merger, for example, making them responsible for curriculum revision and/or academic staff planning. This supports the idea of participation as a critical factor for the successful merger and at the same time gives the possibility to create a stronger merger coalition and decrease the level of resistance. From the empirical data, it is revealed that a number of open meeting were conducted, during the implementation phase, before the merger

took place. The meetings intended to present the main advantages and disadvantages of merger and of building a new bigger school. For the same purpose a user's board was created, which enabled meetings for employees from both schools.

A steering group was created for the purpose of leading the merger process, which included equal numbers of representatives from both schools, municipality representatives and external actors. Creation of the steering group coincides with the establishment of the guiding coalition, described by Kotter (1995), as one of the steps to organizational transformation. According to Kotter (1995) the guiding coalition must be made of people representing different departments and levels of the organization, with a broad range of skills and knowledge. The main task and priority of the guiding coalition is to gather the key stakeholders around the same goal, create a high level of communication and trust and shared understanding of possible risks (Kotter, 1995). In my case of study, the guiding coalition is represented by the steering group, that was created as a main decision-making body. The steering group consisted of an equal number of internal and external representatives, plus one independent external supervisor. The following construction of the steering group corresponds with Kotter's requirement to include representatives from different departments and levels.

According to Kotter (1995) organization's change efforts start with some individuals or groups analysing organization's potential risks and/or opportunities. After observing and analysing such, change leaders should find the way to communicate them to other stakeholders with an emphasis on urgency. The role of the change leaders is to create the feeling of urgency and communicate it to others, so that the change is seen as a solution and the best way out. The end results of the change process should sound convincing and be understood as being good for the organization as a whole and for each and every employee individually. Potential risks and great opportunities, in my case of study, were observed by local politicians and further communicated to the municipality's administration, who ended up with being in charge of the project. The sense of urgency, in the case of merger between Å and Berge schools, was created by means of the situation with Berge secondary school. Because of the school's poor physical condition some decisions and measures were needed to be taken to solve the problem. Accordingly, this situation created the sense of urgency and required a concrete solution. Creating a sense of urgency around new opportunities is closely connected with time, as an important dimension of the change process. Mergers and change process by nature include a time dimension (Pinheiro et al., 2016). Kotter (1995) defines the change process as such that goes through the

series of phases that requires a considerable length of time. Some skipping steps only creates the illusion of success but never show up in satisfying results.

Kotter (1995) in his research about leading change defines creation and communication of the vison as one of the priorities of change leaders and an important step on the way to successful change. The author emphasizes that that the vision must be brief and such that can be easily communicated to the main stakeholders. The vision should clarify the direction in which an organization should move. Jacobsen (2012) defines the vision as something that binds the organization together around the common goal. In the case of Å and Berge secondary schools no clear vision was created, at least on the initial phase of the process. The reason for this may be a fact that the change leaders – local political authorities and municipality's administration, did not have a common perception of what they wanted and how exactly they wanted to organize the process of merger. Therefore, in order to ensure the implementation of the merger process, the change leaders decided to seek external help. Through the empirical data collected, it has been stated that the merger process between Å and Berge secondary schools was not vision-driven, at least at the beginning of the process. Thus, the statement may be said to be supported by the respondent's answers during the interviews.

With regard to the level of communication and user's involvement during the process of merger, respondents mentioned a number of "common arenas" that have been established to maintain good dialogue and close cooperation. Such arenas enabled progress meetings, planning meetings and group works, where contractors, users and consultants were gathered and could work together. On such type of joint meetings partners worked together in order to set common goals and, after having declared them, worked hard to achieve them. This highlights and supports the assumption of high involvement of all the actors (internal and external), providing their views on the merger process. It should also be noted that the implementation model, "Lyngdalsmodellen", that was chosen for conducting the process of merger, had user's involvement as one of its key priorities. During the interviews, respondents mentioned a high degree of their involvement into the process on its different phases and regarding different issues. Thus, it may be stated that the model had a very strong weight of users. Among other model's key priorities, it was mentioned: the high level of interaction, efficient economy and project's flexibility.

Through the empirical data collected, there was a broad consensus that management in the process of merger was homogeneous, i.e. unanimous in its decision-making. A great loyalty

towards the overarching goal was observed among the leaders. This means that leadership within the process of merger between Å and Berge secondary schools shared the same beliefs and agreed around common goals. It should be noted that I am not talking about the steering group which was created for leading the process of merger, but about change leaders who initiated the idea and had an overall responsibility over the process. Thus, it may be argued that the process of merger was based on continuous interaction and communication between the key actors involved. It may be said to be one of the merits of change leaders, who managed to create a good communication and cooperation during the process of merger.

6.4.2. Support for and resistance to change

According to Jacobsen (2012) change is often seen as shifting from something familiar to something new and unknown. Such a situation may lead to a variety of opinions and feelings, and the most central of them turns out to be the feeling of uncertainty and fear of the unknown. Therefore, the wave of disagreement and resistance is seen as quite natural. It has already been mentioned in the theoretical chapter above that both support for and resistance to change are natural elements of the change process. These are based upon personal perception and understanding of change initiative. Accordingly, in order to understand the main reasons for support or resistance that occurs among the actors involved, one should see organizations as consisting of people, who have their own values and interests.

Through the empirical data collected during the interviews, it can be seen that different standpoints and opinions arose in both schools. However, strong reactions and feedback were more evident from Å secondary school, while Berge secondary school occurred to be more neutral. Applying Coetsee's (1999) three different levels of resistance intensity, the resistance within the Å secondary school may be described as *active*, by means of fronting strong critical opinions and conducting protest demonstrations. The protest coalition within Å school questioned the necessity of merger, they expressed their strong critical opinions against change and contributed to critical rumours around the process of merger. Berge secondary school, in its turn, may be described as *passive* and/or *indifferent*. The main reason for the indifference was the fact that Berge school representatives were more concerned on getting a new school and were loyal to either remaining as two separate schools or merging. To sum up, it may be

stated that stronger resistance came from different groups representing Å secondary school (teachers, pupils, parents).

Results from the interviews show that in the case of Å secondary school the following change process was treated as a risk to be laid down. Therefore, groups of teachers and parents have mobilised themselves and tried to actively vocalise and spread their opinion. These groups may be considered as actors who had conflicting interests with the municipality's political leaders and administration. They tried to oppose the process of merger, but did not get approval for this. Among those who protested were interest groups from local communities, who had some personal concerns regarding merger. For example, parents who still wanted to have a school in their district and did not want their children to have a longer journey distance to the new school. Teachers, in their turn did not want to leave the institution they had worked within for many years and devoted their efforts and time to. Jacobsen (2012) emphasizes the more one has invested in something, the more difficult is it to break with it. Here come feelings connected to the working place, routines and well known working environment. One of the respondents from former Å secondary school conveyed, during the interview, that they liked the place they worked at and wanted to continue there. This supports the statement that both working routines and physical space are things that are associated with certain feelings (Jacobsen, 2012). This situation may be also associated with a loss of identity, creating resistance and making it more difficult to implement change.

Stensaker (2005) emphasises that consultation and meaningful involvement help to reduce resistance in different groups and create loyalty. Furthermore, it is important that management has the ability to create a shared understanding of common goals and communicate clear guidelines for how the change should be managed. According to Skodvin (2014) this will help employees to perceive change as low in stressfulness and high in control. The change leadership, in the merger process between Å and Berge schools, payed attention to handling conflicts and creating a high level of involvement. They took into consideration different interests and tried to mediate between them. Accordingly, it may be argued that this helped in reducing the level of resistance and created a greater level of loyalty among the key stakeholders involved in the process of merger.

7. Conclusions

According to Skodvin (1999) a merger, with its variety of required changes, is not an event but rather a process. Tensions in the dynamics of this process focus on factors associated with organizational change and include risk, uncertainty, the need for leadership, planning and negotiation. By means of this study it was intended to illuminate a process of merger and get a full understanding of the particular phenomenon. The thesis helped to assess and interpret the process of merger as a whole by analysing the key factors that are believed to have a great impact on the process flow and its outcomes. Jacobsen (2012) notes that the process of merger, as a type of organizational change, will always activate different interests, different feelings, different perspectives and perceptions of reality. Results of this thesis confirmed the statement and by means of empirical data collection and its analysis, showed that different feelings, perspectives and perceptions arose during the process of merger between Å and Berge secondary schools.

The main driving force behind any merger is some kind of assumed gain (Skodvin, 1999). The most common motive for merging is the desire to achieve economic, academic and administrative gains. The results of this thesis show that the merger of two secondary schools was primarily seen as a means for achieving economic efficiency by merging small institutions into a larger unit. Another key finding is that the case of merger between Å and Berger secondary schools may be defined as being a state-initiated merger. This is a common practise within public sector organizations that reforms and change initiatives are initiated by public authorities such as the state, local politicians and/or municipalities. In my case of study the merger was initiated by local politicians and the responsibility for leading the merger was given to the municipality's administration. Sate-initiated mergers are well known for often being initiated by educational authorities and not requested as such by the employees of the institutions. Such type of merger is more likely to cause resistance among the main stakeholders. The academic staff of Å secondary school turned out to be highly critical towards the merger at the beginning of the process. They expected their views to be heard and considered and reacted with opposition to the merger, since it did not correspond with their views and perceptions. This confirms the statement of Jacobsen (2012) that different interests, feelings and perceptions come forward during the process of change.

At the end of the research process I have made some reflections on the validity and reliability of the study, the representativeness of the selected respondents and whether the findings may

be generalized. There is always the possibility that the selection of the respondents is not ideal and that different or additional informants could have been selected. In a view of the choice of qualitative research method design, I had to limit myself to a certain number of respondents and go in depth instead of going wide. This research study does not intend to generalize findings from the respondents interviewed, to other similar cases. It is difficult to claim that the particular selection of the respondents is representative for a larger group of respondents that I have not interviewed. This study includes a larger number of respondents with ties to the leadership or those who belonged to the steering group. The selection of respondents was done with the aim of getting a highly reliable source of data and interview those who had good knowledge of the merger process and had been directly involved in it. Perhaps it would be appropriate to interview a larger number of "regular" school employees, namely teachers, to get a better overall picture that not only originates from a leader's position.

By means of the study it was expected to contribute with additional knowledge to the planning and execution of merger processes within public sector organizations. The results of this study are believed to be of value for policy makers, institutional managers and organizations who are planning to implement a merger in future. The experience gained from this merger case can be helpful for other organizations being better prepared to organize and implement merger processes. The study also contributes with a better understanding of schools as organizations, mergers and change processes within the school sector.

 It should be mentioned that the majority of literature on mergers is dedicated to the higher educational sector and much fewer research has been done on mergers within the school sector. Therefore, mergers within the school sector may be an interesting field for future research. As already mentioned in the introduction, the case of the merger between Å and Berge schools may be defined as multi-faced by means of the cooperation form and implementation model that were chosen for project's implementation. The effectiveness of the public-private form of cooperation and assessment of the "Lyngdalsmodellen" could be a subject for further research in the particular study case. Institutionalization of change after a merger is completed can also be an interesting topic for future research. The merger is not completed merely by giving a new name to an institution, the implementation phase can last for years. The focus of the research may be directed on measuring the merged institution's progress to see whether it stands in relation to the purpose of the merger, whether the merger may be declared as completed or referred to as a success.

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Attachment

Interview guide:

1). Who came with the initiative about merger between Å and Berge secondary schools?

- Were they responsible for mergers implementation?

2). What was the background for the merger, in your opinion?

3). Was the purpose of merging well explained to the actors involved?

4). What or who were the main driving forces in the process of merger, in your opinion?

5). What was your role in the process of merger? Did you feel a real participation?

6). Did you feel that different reactions arose among the actors involved? (teachers, pupils, parents)

7). What were the main arguments for merger?

8). What were the main arguments against merger?

9). Could you say something about the environment around the merger?

- Was it a good communication between change leaders and school's employees? Between you and your colleagues?

10). How could you describe the information and communication flow during the process?

11). Did leaders manage to create and communicate a clear vision for merger?

12). Were change ideas and vision communicated in many channels and over a long time?

13). Did you get an impression that the vision and goals for change were well understood and accepted among school employees, pupils, parents?

14). Did you feel that there was an understanding of the need for change?

15) . What was the purpose of taking in use the PPP model?

16). Which implementation model was chosen for carrying out the process? What was the main focus with it?

17). Was there a good dialogue and cooperation between internal and external stakeholders?

18). Was a "common arena" established for the dialogue between the key stakeholders?

19). Could you describe the cooperation between Å and Berge schools?

- Were the schools good partners aimed at common goal? Was it a good dialog between them?

20). Did you notice any disagreements among the key stakeholders, during the process?

21). Did you experience a conflict to some extent during the process of merger?

22). Does this form of cooperation succeeded to reach its targets in your view?

23). Did you feel, at any time, uncertainty regarding the merger of the schools?

- Do you have some other things you would like to add or mention before we complete the interview?
- Do you have any questions to me?
- Thank you for the interview!