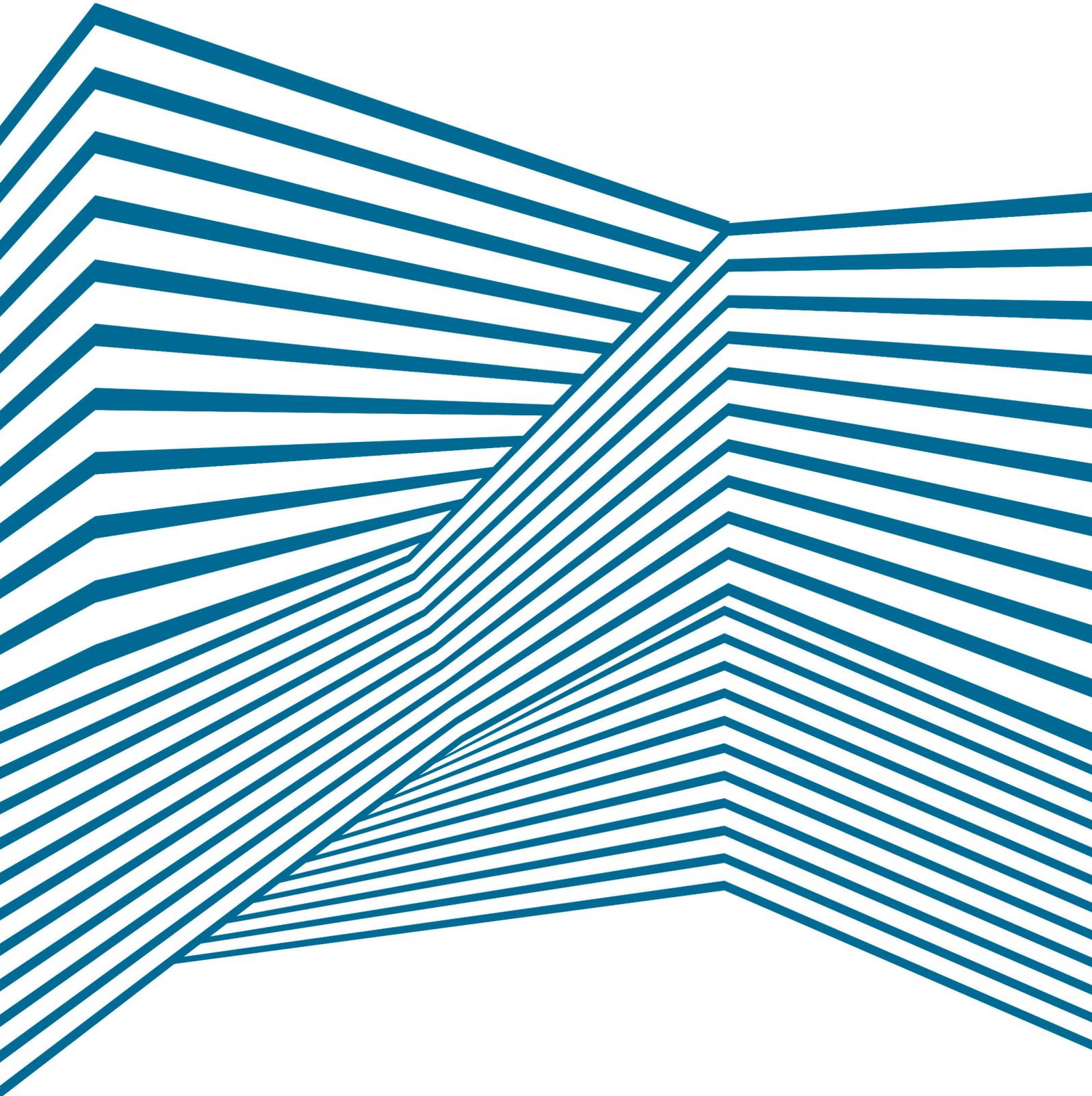


# Building company networks: Norlandia



**Inga Pavlovaite and Pablo Sanz de Miguel**  
October 2021





4	<b>Introduction</b>
5	<b>1. Company analysis: an overview of Norlandia</b>
5	<b>1.1. Company structure</b>
10	<b>1.2. Company ownership</b>
11	<b>1.3. Company's financial position</b>
13	<b>1.4. Company trajectory so far</b>
15	<b>1.5. Company's strategy: diversifying, "being the welfare innovator"</b>
16	<b>1.6. Challenges and opportunities</b>
16	<b>1.7. Workforce at Norlandia</b>
18	<b>2. Regulatory framework and industrial relations patterns in the Nordic countries, Germany and Poland</b>
18	<b>2.1. State regulation of pre-school and care sectors</b>
19	<b>2.2. Industrial relations patterns: diverse collective bargaining institutions and practices</b>
20	<b>2.3. Conflicts: demonstrations and strikes at sectoral and company level</b>
21	<b>3. Working conditions in Norlandia</b>
21	<b>3.1. Key worker concerns</b>
25	<b>3.2. The occupational health and safety issues in the company</b>
29	<b>3.3. The impact of COVID-19 pandemic on Norlandia workforce</b>
32	<b>4. Industrial relations in Norlandia</b>
32	<b>4.1. The union presence in Norlandia</b>
34	<b>4.2. Collective bargaining, social dialogue, information and consultation and industrial action in Norlandia</b>
41	<b>5. Conclusions</b>
43	<b>Further sources of information</b>
44	<b>References</b>

# Introduction

This is a report prepared to summarise the key facts and figures about the private social care provider Norlandia. The report is based on desk research, an online survey of workers and trade union representatives and four interviews with trade union officers in the three Nordic countries where the Norlandia mostly operates (Norway, Finland, Sweden).

As part of this research project, a survey of workers and trade union representatives was conducted in Norlandia units in Norway, Sweden and Finland in late 2020-early 2021. A total of 55 responses to the survey were received, including 11 responses from Finland, 20 responses from Norway (where the company has the largest presence), and 24 responses from Sweden. Due to the low response rate and the low number of survey responses, the survey results cannot be considered statistically representative of the workforce situation and views across all the Norlandia units, and hence need to be considered impressionistic.

In addition, it needs to be emphasised that the Norlandia operations in Poland and Germany are relatively very small and that it has not yet been possible to engage with unions there – taking account also of the very low level of trade union membership in Poland.

Following this introduction, the structure of the report goes as follows. The first section provides an overview of Norlandia by analysing its structure, ownership, financial position, and trajectory. The second section describes the industrial relations patterns in the company. The third section analyses the main problems and challenges in terms of working conditions based on the outcomes from the survey and the qualitative interviews. The report finishes with some conclusions.

# 1. Company analysis: an overview of Norlandia

## 1.1. Company structure

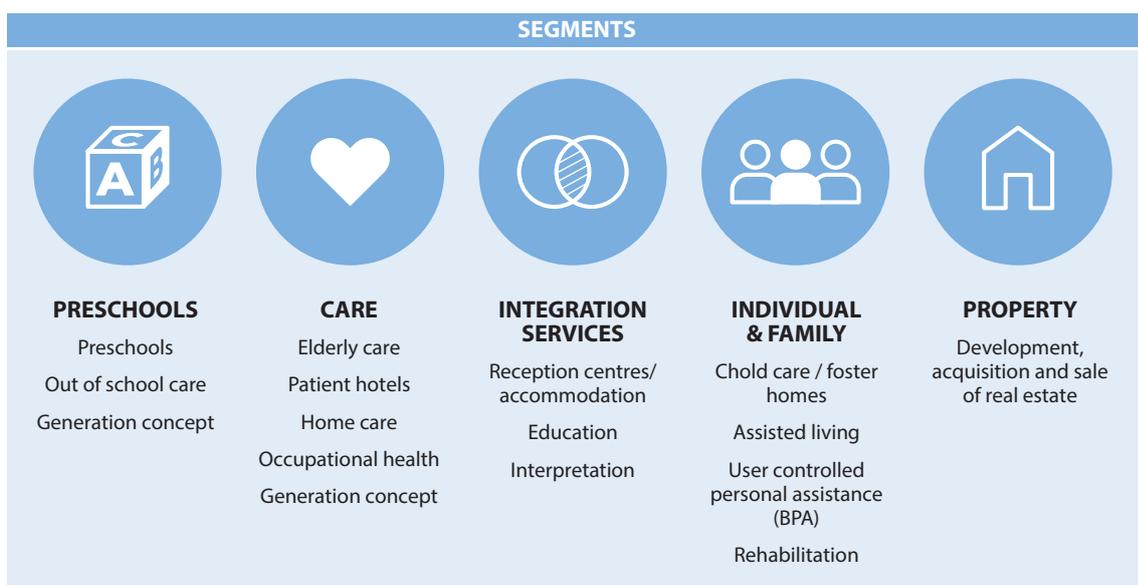
Norlandia is part of **the NHC Group**. Norlandia was established in the 1990s and evolved through several stages into the NHC Group which was formed in 2016.<sup>1</sup>

Hence, there is a need to distinguish between Norlandia and the overall NHC Group.<sup>2</sup>

NHC Group is a multinational European company with **headquarters in Oslo, Norway** and present in six countries – Norway, Sweden, Finland, the Netherlands, Germany and Poland. The Group identity, management and ownership is dominated by the Norwegians.

NHC Group consists of several companies and segments in several fields relating to providing residential and non-residential social care, such as nursing homes, health care, preschools, integration services, and individual and family services.

The Group itself sees itself as offering the following types of social services across the lifecycle of individuals and families, for young children, elderly people, patients, people with disabilities, asylum seekers and other groups. The Group also has property management services, but this generates very little revenue (below 1%).



**The Group's individual companies are:**



**Turning to the four companies:**

**Norlandia Preschools**<sup>3</sup> offer the early years education services to children and their parents in the pre-school education phase.

Norlandia Preschools in Norway for example have over 60 kindergartens from Mandal in the south to Tromsø in the north, all of them in Norway.<sup>4</sup> They have been ISO certified in 2014 and appear to develop as local centres integrated into local communities. The privately run early school education is regulated in Norway, and the maximum price for a kindergarten place in Norlandia kindergartens is determined by the Storting (the Parliament in Norway). In Norlandia kindergartens, the payment is due for 11 months, July is payment-free. Payment for food is in addition and is determined in the individual kindergarten.

**Aberia Healthcare**<sup>5</sup> works in health, care and child welfare in Norway and Sweden. Services to children, young people, adults and families are provided on behalf of the public sector. Aberia started in 2002 in Norway and currently has around 600 employees. Aberia is now part of the NHC Group.

**HERO**<sup>6</sup> specializes in services aimed at refugees and immigrants in the Nordic Countries and Germany. The company offers:

- Reception centers
- Interpretation services
- Kindergartens
- Training and Education.

**Norlandia** provides social care services of several different types, and operates facilities in preschools, patient hotels, nursing homes, home care and medical clinics.

The list of group run facilities is shown below. Most of entities are in Norway and Sweden. In contrast, Norlandia's presence is much smaller in Finland (45) and Poland (23).

The different segments of Norlandia have different presence in the different countries. The most versatile profile is in Norway, the original base and heart of the company operations, where all types of segments and services are provided by the company. In Sweden and Finland, several segments are also present, but mostly from the segments of preschools and care. Here, integration services and individual&family segments are less developed. In contrast, in the Netherlands and Poland (which are relatively new markets for the company) it is the preschool segment dominating the new markets.



### Norlandia preschools<sup>7</sup>

Preschools of Norlandia are based in several countries as follows:

- Norway, with around 60 kindergartens owned by the company across the country. It appears that all Norlandia preschools in Norway operate under a separate Norlandia Preschools company, also part of the NHC Group (see above).
- In the Netherlands and Poland, Norlandia operates exclusively the kindergartens, with few other services segments present.

### Norlandia Patient hotels<sup>8</sup>

Norlandia runs four patient hotels, two in Norway and one each in Sweden and Finland.<sup>9</sup> The hotels are built adjacent to some of the main hospitals in the Nordic countries, and the hotels have agreements with the hospitals where they are located. The hotels are open to everyone, and are oriented towards serving the needs of visitors and families of patients and patients themselves who then we do not need to stay in the hospital wards. This is because the patients who can take care of themselves do not need to stay in the hospital ward, thus freeing up the hospital space and yet having access to medical and rehabilitation facilities. In the words of Norlandia itself *"Patient hotels are cost effective for the hospital and society, and contribute to a good patient experience of treatment."*

### Norlandia Nursing homes<sup>10</sup>

These are the traditionally understood nursing homes for the elderly. There are four nursing homes in Norway and 11 in Sweden.

The nursing homes in Norway are based in the metropolitan area of Oslo, indicating that the home workers are located in a fairly limited area (e.g. to travel to union meetings):



Tåsenhjemmet Oslo



Gullhaug bo- og behandlingshjem Bærum



Oppsalhjemmet Oslo



Skoggata bo- og servicesenter Moss

The care homes in Sweden are distributed across the country, including the metropolitan area of Stockholm, central and southern Sweden. This could mean that workers need to travel across the country for example for union meetings and other union activities.



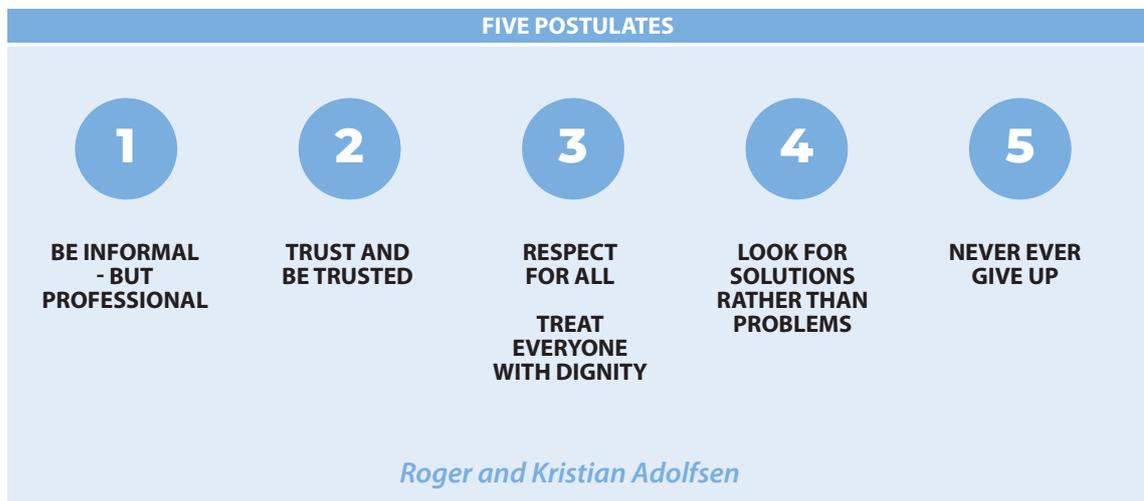
### Norlandia home services<sup>11</sup>

Norlandia Home Services is a provider of home nursing, home care (practical assistance) and BPA (user controlled assistance for people with disabilities<sup>12</sup>). In Norway, this is offered in three cities – Oslo, Akershus and Bergen. Here, it is one of the largest private providers of care services. The care system in Norway works in a way that if a person has received a decision from the municipality about the need for care, they are free to choose Norlandia Home Services as a supplier in accordance with the free user choice. This is then funded by the municipality.

Norlandia also offers a range of additional services, such as a visiting friend and private physiotherapy. These services the users would pay themselves out of their own pocket.

## 1.2. Company ownership

Norlandia and NHC Group is privately owned, by two Norwegians, brothers Kristian and Roger Adolfsen. They have originally established the Norlandia company in 1997. The two brothers have originally come from the hotel and hospitality industry and have brought this experience to Norlandia. There have been historical developments where outside capital was brought into the company (see below), but in 2020 the company’s ownership is back in the hands of the two original owners. The owners have an active involvement in the running of the Group and Norlandia (see below). They are both on the board of directors of the Group and Kristian Adolfsen serves as a chairman of the board of directors.



### 1.3. Company’s financial position

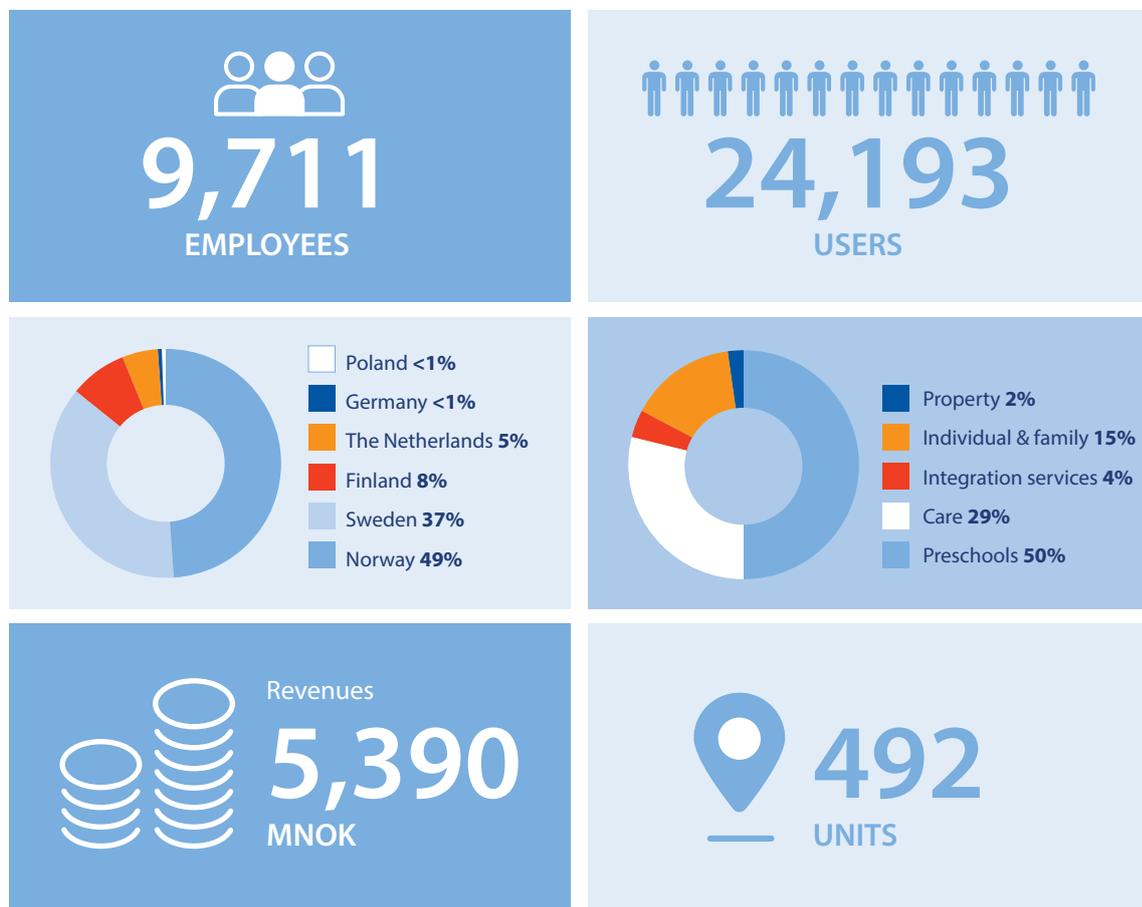
The main performance indicators for the NHC Group as a whole are provided below.

In 2020, the group employed **9,711 employees**, making it one of the larger providers of care services in northern Europe. Its services were used by over 24,000 people in 492 units in six Member States.

**Norway continues to bring a half of the company’s revenues**, as this has been historically the base and core of the business operations. However, the company strategy to diversify into other countries has borne fruit insofar that other five countries bring in over 50% of the Group level revenue. Clearly, **Sweden is the second most important market** for the company, responsible for around 40% of the revenue. Other countries, especially Germany and Poland play a minor role in generating the company revenue.

Telling is also the importance of the five different segments of company operations in generating the revenue. **Around 80% of the revenue is generated by just two segments, preschools and care.** Half of the revenue is generated in the preschools providing early childhood education services. **Care services were second** in importance, generating 29% of the revenue. Other segments were less important. Property management services accounted for 2% of the revenue.

Figure 3: Key Group financial indicators, 2020



Source: NHC Group Annual Report 2020.

The financial position of the Group is overall sound and stable. The latest financial information is available for the year 2020.

The latest available annual 2020 Norlandia report concludes that **“The Group’s financial position is sound.”** On the positive side, the Group’s **revenues increased** by around 7% annually, from NOK 5,046.6 million in 2019 to NOK 5,390 million in 2020. The growth in the revenues is primarily **driven by the international growth** outside Norway within the **Preschools** segment.

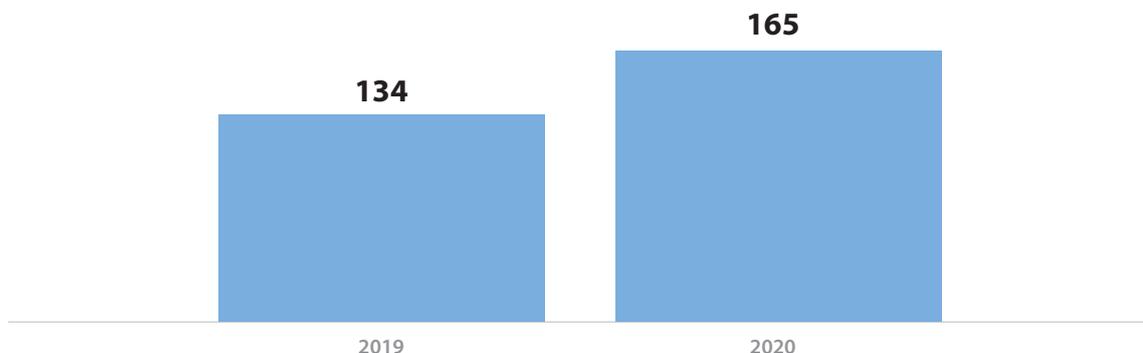
Profit from operations came in at NOK 268.8 million in 2020, significantly up from NOK 122.6 million in 2019. According to the company annual report, this is primarily explained by international growth within Preschools. Consequently, **net-loss after tax increased** from NOK -63.8 million in 2019 to NOK -15.5 million in 2020. IFRS-16 (International Financial Reporting Standards) was adopted on 1 January 2019. This adoption had a negative effect on profit before tax, with NOK -97.8 million in 2020.

Looking over the last five years, there are indications of positive financial trends (see Figure 4). Between 2019 and 2020, the Group’s **total revenue increased** from NOK 5,046.6 million in 2019 to NOK 5,389.5 million in 2020, representing an increase of **6.8%**.

In 2020, there was still a decrease of asylum seekers to Europe, and especially to Norway, leading to decreased Integration Services revenue by NOK 79,054. Real Estate and Other services revenues also declined from NOK 11,643 and NOK -2,939, respectively in 2019 to NOK 5,368 and NOK -4,708, respectively in 2020. This was compensated by considerable growth in revenue from other services. Preschools, Care, and Individual & Family services combined revenues in 2020 were up by NOK 392,539 compared to 2019, while EBITDA<sup>13</sup> increased from NOKm 134 in 2019 to NOKm 165 in 2020.

**Figure 4: Key Group financials 2015 - 2020**

**EBITDA est. development (NOKm)**



Source: NHC 2015 – 2020

## Revenues



Source: NHC Group Annual Report 2020, 2019, 2018, 2017, 2016, 2015.

### 1.4. Company trajectory so far

The key dates and developments in the company history are provided below. To sum up, the company has been operating **for over 20 years**. It has started in Norway as a **family business** by two brothers who continue to own the company also in 2021. Between 2007 and 2011 a private equity firm FSN Capital owned 45% of the company, but exited in 2011. Since then, the company shares are fully owned by the two original founders. The NHC Group is listed on the Oslo Stock Exchange where it files regular quarterly and annual financial reports.<sup>14</sup>

Norway is where it continues to have the heart of its operations. The company developed outside Norway in other European countries through a continual acquisition of local companies. Since 2014, over the last five years, the company has acquired a new local company in its new markets every year. This indicates a sound financial position and a consistent strategy to pursue growth through regular acquisitions across the different segments of the business in the different countries outside Norway.

There is no indication so far that the company is planning to expand outside Europe.

**Figure 5: Key dates and developments in Norlandia history**

Date	Development	Significance
1997	Norlandia Care AS <sup>15</sup> was established as a spin off from Norlandia Hotels & Resorts.	The start of providing care services.
2007	The Nordic private equity company FSN Capital acquires 45% of Norlandia Care AS.	Outside private capital firm is brought in to provide capital to expand the business.
2008	Establish preschool company ACEA Holding AS.	Starting to provide preschool services.
2010	Establish Aberia Healthcare	Starting to provide health services.
2011	FSN Capital exits Norlandia Care AS. Norlandia Care Group AS (NCG) is created as a merger between Norlandia Care AS and ACEA Holding AS.	Outside capital exits Norlandia and the two original owners regain the complete ownership of the company. Care and preschool segments merged into one legal entity.
2014	The two owners acquire a majority stake of integration services company Hero Group from ISS (in Germany).	Acquisition of HERO, starting a new segment in integration services.
2015	Acquisition of Kosmo, a major Swedish elderly care operator. Acquisition of 100% of preschool company Kidsa.	Expansion into Sweden through a local acquisition. Further expansion of preschool services.
2016/2017	Kristian and Roger Adolfsen acquire all minority stakes in NCG, Hero, Aberia and Kidsa and merge them to form the NHC Group.	The current legal form – NHC Group – is established through a merger of all the different brands so far.
2018	The owners acquire Swedish health care operator Frösunda. While Frösunda is not part of NHC, there is an increasing cooperation between the two companies.	Further expansion into Sweden.
2019	NH Europe is established as a joint venture (JV), with NHC owning 49% and Hospitality Invest owns 51% of the company. NH Europe is operated by NHC and has acquired several preschool chains in the Netherlands, Finland, Poland and Sweden.	Further expansion into preschools in the Netherlands, Finland and Sweden.
2020 and future	Important refinancing is planned in 2021 – no further details found yet.	

## 1.5. Company's strategy: diversifying, "being the welfare innovator"

The historical development of the company demonstrates the dominating business model in Norlandia.

As it was started as a family business with roots in the hotel business, the core idea was to use strengths from various segments to combine services and expertise from them. In particular:

- Within elderly care and patient hotel operations the company attempted right from the start in 1997 to combining experience from the two business areas. Within elderly care, they have reflected the hotel service; conversely, in the hotel operations they offer customized medical service with the care skills from nursing home operations.
- Preschool operations add to these two business areas pedagogical skills and knowledge of systematic activity planning. The preschools are expected to draw inspiration from the care and service expertise across the group.

Another key approach was **to diversify the business** across the various segments of care and into different countries. This meant in practice:

- One track in this strategy was **to internationalise**, and this has led to more than 50% revenues being generated outside Norway. This has enabled a sound financial growth in the company and expansion of revenues generated. The downside is the different national contexts for a private operator like Norlandia in different countries.
- Another track was to expand **into different segments of care services, covering different groups and including new groups (such as asylum seekers)**. This is best exemplified with the preschool segment, which was added relatively recently into the company's portfolio but now generates nearly 50% of its revenues. This means that challenges in one segment (e.g. decline in the asylum seekers for integration services) can be offset by revenue growth in other segments.

Further key aspect of the corporate identify is the concept of **being a "welfare innovator"**. This is mentioned across the corporate documentation and the public website. Essentially, this indicates a desire to develop and offer new innovative solutions of care, enhancing and addressing the existing and emerging needs of the societies. Several examples are mentioned in this respect:

- Using the AI – for example, in the business processes. The company participated in testing the robot in the use of accounting and invoicing process to save costs.
- Welfare 2.0 – the company runs an accelerator programme for social welfare start-ups with a incubator company Charge.
- The company has an Innovation Board where ideas for innovation are submitted and discussed.

- The Generation Concept was developed to reflect the experience of working with both children and elderly people.
- New methods were rolled out fast during the first Covid-19 wave, including digitalized meetings and trainings, Live streams from preschools, distance learning materials.

The concept of welfare innovator could be useful in the context of establishing a EWC – demonstrating company’s commitment to innovate also in relation to the welfare of its own employees.

## 1.6. Challenges and opportunities

Several company reports point to **the challenging political context in Norway and Sweden for private care providers**. This is indicating the general societal reluctance to allow private providers in the context of the Nordic welfare state models where the state provides care, from cradle to grave. In contrast, the growth in the Netherlands appears to have taken place in the context of much more positive disposition towards privately run social provision.

The company business model is open to external shocks. Examples are:

- The influx of asylum seekers increased a demand for the company’s integration services. A decrease in the arrivals has consequently led to the diminishing demand for this segment of company’s offer.
- COVID-19 pandemic.

## 1.7. Workforce at Norlandia

In 2020, the company had around 9,700 employees in the six countries, reaching balanced representation of both genders in first line, middle manager, and senior leadership positions. In 2020, the company’s gender balance at the senior level was as follows: women make up 3 of the eight line CEOs; eight out of 12 country; and 14 of the 32 managers in the extended management group. More precise breakdowns for the rest of the employees in 2020 (e.g. per country, gender, age, FT/PT, permanent/temporary) do not appear in the public documentation. Most employees (data from 2019) were based in the Preschool segment<sup>16</sup>, as follows:

- 3627 preschool employees in Norway and Sweden
- 1267 employees in preschool international
- 3176 care employees
- 1147 Individual and family employees.

The company is recruiting at the moment, with positions open in Norway, Sweden and the Netherlands. This is indicating the business growth but could also be a sign of high staff turnover due to the working conditions. Here, more precise figures from HR would be of interest.

In the words of the company's website, the company has a clear commitment to respecting and promoting the interests of its employees:

***"We have ambitious goals for workforce job satisfaction, sick leave, and rate of employee turnover. We have a clear personnel policy and comprehensive ethical guidelines which are widely known and accepted by everyone at Norlandia."***

The company also made investments into the quality management procedures. In 2011 they implemented TQM (Total Quality Management) in its nursing homes and patient hotels; TQM is now also used in its preschools.

On March 25, 2014, all three business segments in Norway received their ISO-certification.

## 2. Regulatory framework and industrial relations patterns in the Nordic countries, Germany and Poland

### 2.1. State regulation of pre-school and care sectors

#### Pre-school sector

In all three Nordic countries, the local governments have the primary responsibility for the pre-school sector, within nationally set frameworks for education curriculum, contents, tasks and fee structure. The popularity of private pre-schools such as provided by Norlandia units differs between the Nordic countries. In Sweden and Finland, the proportion of children attending private preschools is 20%, while in Norway almost 50% of children go to a private preschool.

In **Norway**<sup>17</sup>, ECEC is not compulsory in Norway, but children are entitled to a place in a publicly subsidised kindergarten from the age of 1 year. Children can attend pre-schools until age 6 when they start primary school. Municipalities are responsible for assigning a place to the parents and securing enough kindergarten places to meet the demand.

Kindergartens are under the overall responsibility of the Ministry of Education and Research and one of its directorates, the Norwegian Directorate for Education and Training is responsible for the development of kindergartens. The national Framework Plan for Kindergartens sets contents and tasks across the whole pre-school system, both public and private. In Norway, 50 % of the children attend a private kindergarten. Private kindergartens receive the same funding as the public kindergartens do, by the same municipality.

In **Sweden**<sup>18</sup>, from age 1, children are entitled to publicly subsidised ECEC provision and, from age 3, they are entitled to provision that is free of charge for at least 15 hours per week. The majority of children, 80 percent, are enrolled in municipal preschools (9813 municipal preschools in 2016/17) and the remaining 20 percent are enrolled in independently run preschools (2 708 preschools 2016/17). In Sweden, most players are small. 9 out of 10 actors own and run only a single-unit preschool. Less than 1% of all actors run 10 preschools or more (such as Norlandia).

In Finland, all children under school-age have a legal entitlement to full-time early childhood education and care in an ECEC centre or a family daycare premise. Municipalities have a statutory duty to provide ECEC services according to the local need. The majority of children are enrolled in municipal ECEC centres. Families pay fees for ECEC. The fees vary between 0 – 288 € in full-day provision depending on the size and income. In private pre-schools, ECEC fees are usually higher and around 18% of children attend such private centres.

## Care sector

In **Norway**, care is the responsibility of municipalities<sup>19</sup>. The state influences through legislation, standards, regulations and guidelines, and through ‘soft power’ such as recommendations, education, surveillance and targeted grants. Within this national framework, approaches and priorities can vary between municipalities. Care services in Norway target the entire population above the age of 18, not just elderly care. Contracting out to commercial actors such as Norlandia is controversial, and much more common in the childcare and pre-school services than in the care sector.

The Norwegian Board of Health Supervision has overarching responsibility for the supervision of health and care services. The Offices of the County Governor supervise services in their area, and handle complaints from users who think the municipal services offered are insufficient. In addition, there is a set of national quality indicators that has been considerably expanded recently and an ombudsman for patients and users. Finally, for the past years, the government has issued annual White Papers on ‘Quality and security for patients’.

In **Finland**, social and health care are to a large degree integrated. Finland’s care regime is a mixed one, combining public, private and individual provision.<sup>20</sup> Most social services are provided by the municipalities (local governments). Estimated 50–60 % of the employees in the sector work for public sector employers. The private part of the sector is growing. Municipalities can provide in-kind services themselves or buy them from other municipalities or from private service providers. Therefore most of the costs of private service providers are also paid for by the municipalities. Municipalities may also give vouchers for the elderly to buy services themselves from private service providers.

Finland is currently planning to restructure major parts of national social and health care service systems and provisions, which could increase the role of private companies such as Norlandia. The ongoing SOTE-reform (social and healthcare reform) is the largest restructuring of social and healthcare services Finland has ever carried through. The planned reform has dominated much of the debates. The Government’s proposal includes the introduction of new regional governments as a new level of administration and a ‘freedom of choice’ principle—making it possible for patients to choose between public or private service providers.

In **Sweden**, municipalities are legally or contractually responsible for childcare, care of the elderly and disabled and wider social services. Services are mainly provided by the public sector but the number of private companies has increased over the past 20 years. Ever since the influx of asylum seekers in 2015, many new private companies dominate in providing such services. 82% of the residential care homes for children and young persons are owned by private companies.

## 2.2. Industrial relations patterns: diverse collective bargaining institutions and practices

When comparing the main sectoral and company-level industrial relations characteristics of the Norlandia countries, it appears that, in the Nordic countries and potentially German units, there is a quite robust collective bargaining structure<sup>21</sup>. Trade unionisation level is likely to be much lower in Poland.

In Norway, in the care and pre-school sectors, as in most parts of the economy, a two-tiered bargaining system exists. Company-level wage negotiations take place after the central sector level negotiations. The collective agreements establish a framework when it comes to working time, but company agreements are also important when it comes to working time arrangements and scheduling at company level for employees working outside the 'normal' working day (unsocial hours). For care and pre-school sectors, there is sectoral collective bargaining at national level and social dialogue structures where trade unions can formally be involved in the regulation of the sectors covered by Norlandia (such as pre-school and care). According to trade unions' officers interviewed, I&C are exercised at Norlandia units.

In Sweden, sectoral collective bargaining at national/sectoral level exists, regulating general employment and working conditions. The largest collective agreement in the care sector is between the trade union Kommunal and the Swedish Association of Local Authorities and Regions. There are also three other large agreements and three smaller agreements. As many private companies started operating within this sector, it becomes more difficult for the trade unions to organise the work force. The trade union organisation rate is still quite high in the private sector. According to trade unions' officers interviewed, I&C are exercised at Norlandia units.

In Finland, social and health care are to a large degree integrated in Finland. There is sectoral collective bargaining at national level and well-developed social dialogue structures where social partners can formally be involved in the regulation of the sectors covered by Norlandia (such as pre-school and care). In Finland, the social care private sector has a dedicated social services agreement (Yksityisen sosiaalipalvelualan työehtosopimus 2018–2020), which also covers non-signatory organisations and thus achieves 80-90% sector worker coverage (Norlandia is covered by the agreement). According to trade unions' officers interviewed, I&C are exercised at Norlandia units.

The Norlandia operations in Poland and Germany are relatively very small and that it has not yet been possible to engage with unions there during this research project.

In general, in Germany, the level of unionisation is relatively high and it can therefore be expected that the HERO group employees are likely to be a member of trade unions. In contrast, the level of unionisation in Poland is relatively low and hence the level of trade union representation in Norlandia pre-school units is likely to be low.

### **2.3. Conflicts: demonstrations and strikes at sectoral and company level**

Once the report has presented the regulatory framework and the main industrial patterns identified in each country, it is worth analysing whether major conflicts at sectoral or company level have taken place in recent years. Information gathered through desk research and qualitative interviews revealed no such conflicts and industrial actions.

## 3. Working conditions in Norlandia

To explore the working conditions in the company, a survey was conducted during the project amongst the company workers and trade union representatives. The key patterns in terms of working conditions amongst the company's workforce are consistent across the three Nordic countries.

### 3.1. Key worker concerns

Key worker concerns relate to the wages which are below average. The main concerns expressed by a majority of workers surveyed for the research were the unsatisfactory level of **wages**, **time pressures** to undertake job tasks at the right speed and **the lack of enough workers** at the facility that the workers are working in. The majority of workers also expressed concerns about the lack of training to undertake their job properly and the lack of good prospects for career advancement. The working conditions in the company are considered to be **below the average compared to other similar companies** - especially for wages. A significant number of workers in the survey reported that the company has **introduced cost saving measures** in the last year. This was echoed in the interviews with trade unions – especially concerns about wages. The company has also been putting in place cost saving measures to be competitive.

As shown in Table 1, the main concerns expressed by a majority of workers in the survey<sup>22</sup> relate to the unsatisfactory level of wages, time pressures to undertake job tasks at the right speed and the lack of enough workers at the facility that the workers are working in. The majority of workers also expressed concerns about the lack of training to undertake their job properly and the lack of good prospects for career advancement. In contrast, most of the workers in the survey pointed out the positive aspects of having fair and safe work environment as well as their involvement in setting their working time. The patterns for such views were similar across the countries.

**Table 1: What is your opinion on the following statements?**  
Nordic countries

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
<i>Your current job pays decent wages which enable a good standard of living for you</i>	2	4	2	12	6
<i>You have enough time to get your job done at the right speed</i>	2	4	4	12	5
<i>There are enough health/care workers to do the work of the facility you work at</i>	2	7	2	13	4
<i>Your working times are set by consulting you at least partially</i>	2	6	9	10	1
<i>You get enough training to do your job properly (for example, you have regular training sessions, your training needs are discussed annually)</i>	3	8	3	10	4
<i>Your current job offers good prospects for career advancement</i>	2	5	7	11	3
<i>Your current job offers fair and safe work environment</i>	4	9	6	7	1

Question to the workers only (number of responses received: 28). All countries combined. Numbers refer to the number of respondents choosing the answer option. As shown in Table 2, most workers in the survey expressed a need for further training to cope well with their duties. In terms of workers being overskilled or underskilled for their duties, the views are split, between workers who think they have skills corresponding to their duties and those who think they more skills than their jobs demands. Furthermore, the workers are not positive about the impact of the training they received at the company. Only a minority indicated that the training has improved their prospects for future employment or that it has improved the way they work.

**Table 2: Which of the following statements would best describe your training and skills in your own work? Nordic countries**

Statement	All countries	NO	SE	FI
<i>I need further training to cope well with my duties</i>	15	1	3	11
<i>My present skills correspond well with my duties</i>	16	9	5	2
<i>I have the skills to cope with more demanding duties</i>	10	6	3	1
<i>I feel my prospects for future employment are better after the training received in this workplace</i>	8	0	2	6
<i>The training I received in this workplace has helped me improve the way I work</i>	3	1	2	0
<i>I feel that my job is more secure because of my training received in this workplace</i>	0	0	0	0
<i>I have not received any training in this workplace</i>	3	1	2	0
<b>Total answers</b>	<b>55</b>	<b>18</b>	<b>17</b>	<b>20</b>

Question to both trade unionists and workers. Multiple choices were possible.

The working conditions in the company are considered to be below the average compared to other similar companies in the private sector in the countries where the company is operating (see Table 3). This is especially prominent in relation to wages, where the majority of respondents noted wages being below the industry average in the country. Also other aspects of working conditions were considered to be below average – such as physical adjustments at work, ICT usage, access and provision of training, staff ration or implementation of quality and health and safety standards. The only area where a more positive situation than the average was reported relates to company offering good job security.

**Table 3: Compared to other similar companies in the country, are the working conditions above or below the average in your country** Nordic countries

Topics	Above average	Below average	Don't know	Total answers
Wages	4	19	12	35
ICT usage and privacy rights (tablets, ICT mobile devices, etc.)	5	17	11	33
Adjustments to the physical environment at work	9	16	8	33
Access and provision of training	8	15	11	34
Measures to ensure equal treatment and non-discrimination	7	15	12	34
Staff ratio	10	15	7	32
Implementation of quality standards	9	14	10	33
Health and safety standards	7	14	10	31
Professional categories	9	13	12	34
Working time	8	13	11	32
Work-life balance and working time flexibility	4	11	12	27
Promotion	5	11	16	32
Job security	15	11	7	33
Work intensity	8	7	15	30

Question to both trade unionists and workers.

As shown in Table 4, there is also a significant number of workers in the survey who reported that the company has introduced cost saving measures in the last year. This was especially reported by workers in Norway and Finland, and less so in Sweden.

**Table 4: Have any cost saving measures been introduced within the last year?**

	Nordic countries	NO	SE	FI
<b>Yes</b>	16	7	0	9
<b>No</b>	4	1	1	2
<b>Don't know</b>	7	3	0	4

Question to workers.

### 3.2. The occupational health and safety issues in the company

**Several physical OSH issues** remain to be addressed, with the main pattern consistent across the countries. Survey results indicate a significant extent of OSH problems in the company - about half of the workers responding to the survey indicated that they or their colleagues experienced OSH problems in the last year. The most important OSH issues related to physical hazards, such as lifting or moving people or heavy loads and increased risks of slips, trips and falls. Main OSH issues are not considered to be handled well by the company. The majority of workers responding to the survey reported being very well and well informed when it comes to occupational health and safety risks.

Survey results indicate a significant extent of OSH problems in the company (see Table 5). About half of the workers responding to the survey indicated that they or their colleagues experienced OSH problems in the last year, a pattern consistent across the countries (with fewer issues reported in Finland). Similarly, trade unionists reported a number of accidents and OSH related illnesses over the last 5 years in the company, with similar trend across the three countries.

**Table 5: OSH accidents and problems in the company**

	Nordic countries	NO	SE	FI
<i>How many accidents and occupationally related illnesses are you aware of in the company in the last 5 years?</i>		Between 0 and 10	Between 1 and 20	Between 1 and 15
<i>Have you or your colleagues experienced any occupational safety and health (OSH) problems in the last year?</i>				
<b>Yes</b>	15	8	4	3
<b>No</b>	10	1	1	8
<b>Don't know</b>	6	2	0	4

Survey respondents also indicated the most important health and safety problems in the workplace (see Table 6). Noteworthy is the fact that many issues highlighted in the survey were highlighted as important issues facing the company. The only exception was relating to the fear of job loss, which is not considered to be an important OSH issue. Otherwise, the most important OSH issues related to physical hazards, such as lifting or moving people or heavy loads and increased risks of slips, trips and falls. Amongst psychological problems, most important issues were considered to be the time pressure, and poor communication and cooperation at company's workplaces. These key problems were followed by a range of OSH issues which were also considered important. Amongst the physical aspects, most respondents highlighted the lack of ergonomic workplaces, repetitive hand and arm movements and tiring and painful positions. In relation to non-physical aspects, a significant number of survey respondents pointed out the problem of long and irregular hours, being subject to unacceptable behaviours such as bullying or harassment and having to deal with difficult customers. The patterns of reported problems were similar across the countries.

**Table 6: What do you think are the most important health and safety problems in your workplace?** Nordic countries

	Very important	Important	Neutral	Not important	Least important
Lifting or moving people or heavy loads	8	23	11	1	0
Increased risk of slips, trips and falls	7	18	13	4	1
Time pressure	5	20	12	1	0
Poor communication or cooperation at your workplace	6	16	12	2	4
Lack of ergonomic set up of workplaces	3	18	15	3	2
Long or irregular working hours	6	14	12	6	4
Repetitive hand or arm movements	4	14	9	6	4
Tiring or painful positions	5	14	11	4	1
Being subject to unacceptable behaviours such as bullying or harassment	12	7	17	6	1
Having to deal with difficult customers, patients, etc	5	13	16	4	3
Fear of job loss	1	6	15	7	7
Others	2	2	1	2	2

Question to both trade unionists and workers.

The survey respondents were also asked about how well the company handles the most important health and safety problems at the workplaces (see Table 7). Around a third of respondents were consistently neutral about company's response to such problems, neither considering them handled well nor handled at all. Otherwise, the prevailing view is that across the most important health and safety issues, only two are handled well or very well. This relates to the problem of poor communication and cooperation at the workplaces and lifting or moving people or heavy loads. The other two problems of key importance (see Table 6), increased risk of slips, trips and falls and time pressure are not considered to be handled well by the company. To sum up, company's response to the main OSH problems leaves a significant room for improvement. The patterns reported were similar across the countries.

**Table 7: How well do you think the most important health and safety problems are handled in your workplace?**

	Very well	Well	Neutral	Not well	Not well at all	Total
Fear of job loss	2	20	16	10	5	53
Poor communication or cooperation at your workplace	1	19	17	8	3	48
Lifting or moving people or heavy loads	2	15	16	8	3	44
Being subject to unacceptable behaviours such as bullying or harassment	5	8	19	6	4	42
Repetitive hand or arm movements	0	11	18	8	5	42
Increased risk of slips, trips and falls	2	9	21	7	3	42
Time pressure	0	9	22	7	3	41
Having to deal with difficult customers, patients, etc	4	7	19	4	3	37
Lack of ergonomic set up of workplaces	2	6	15	11	5	39
Long or irregular working hours	2	6	14	12	3	37
Tiring or painful positions	1	6	20	8	5	40
Other problems	2	2	1	2	2	9

Question to both trade unionists and workers.

Workers responding to the survey reported being very well and well informed when it comes to occupational health and safety risks (see Table 8). This was the case for the majority of workers, and similar across the three countries covered.

**Table 8: When it comes to occupational health and safety risks in the workplace, how well do you consider yourself to be informed? Nordic countries**

	Very well	Well	Neutral	Not well	Not well at all	Total
NO	2	1	1	1	1	6
SE	5	4	0	0	2	11
FI	0	9	4	3	0	16
<b>All countries</b>	<b>7</b>	<b>14</b>	<b>5</b>	<b>4</b>	<b>3</b>	<b>33</b>

Question to workers.

### 3.3. The impact of COVID-19 pandemic on Norlandia workforce

**The COVID-19 pandemic impact** has been similar for the workforce in Norlandia across the Nordic countries. The most frequently reported impact related to the increased provision of personal protection equipment and new safety and hygiene protocols; confirmed by interviews. In contrast, the impact on the working intensity, more working hours or staff ration were not identified by the survey respondents. Views on the quality of company's response to the COVID-19 crisis are mixed: over 40% of respondents saw the company's response being very adequate and adequate, with a large proportion of respondents who had a neutral opinion on this matter. Trade unions were consulted on the company's response.

The COVID-19 pandemic had an impact on the company's workplaces (see Table 9). The most frequently reported impact related to the increased provision of personal protection equipment and new safety and hygiene protocols. In contrast, the impact on the working intensity, more working hours or staff ration were not identified by the survey respondents. This was very similar across the three countries covered.

**Table 9: What has been the impact of COVID-19 crisis been on your working conditions?**

	Nordic countries	NO	SE	FI
More provision of personal protection equipment	30	2	8	20
New safety and hygiene protocols	29	5	6	18
Increased activity	5	2	1	2
Introduction of short term working	5	2	0	3
Additional working hours and overtime	8	2	6	0
Increased staff ratio	3	0	2	1
Other	1	1		

Question to both trade unionists and workers.

Views on the quality of company's response to the COVID-19 crisis are mixed (see Table 10). On one hand, only a minority of survey respondents considered that company's response was inadequate. Over 40% of respondents saw the company's response being very adequate and adequate. In contrast, there is also a large proportion of respondents who had a neutral opinion on this matter.

**Table 10: How adequately do you think has the company responded to COVID-19 crisis to provide support to workers like you?**

	Nordic countries	NO	SE	FI
Very adequately	10	2	6	2
Adequately	10	3	2	5
Neutral	15	8	2	5
Inadequately	5	1	0	4
Very inadequately	7	0	6	1

Question to both trade unionists and workers.

Survey respondents were also asked to indicate whether the trade union was involved with the employer in developing the company's response to the COVID-19 crisis (see Table 11). This was reported to be the case by a third of survey respondents, with half indicating the lack of union's involvement, and the remaining not knowing the situation in this respect.

**Table 11: Did your trade union/working committee bargain with the employer the company response to the COVID-19 crisis?**

	Nordic countries	NO	SE	FI
<b>Yes</b>	<b>14</b>	<b>5</b>	<b>1</b>	<b>8</b>
No	20	8	5	7
Don't know	11	5	5	1

Question to both trade unionists and workers (n=45).

## 4. Industrial relations in Norlandia

### 4.1. The union presence in Norlandia

Norlandia has a **strong union presence**, with pattern consistent across the Nordic countries. Trade unions play a strong role in the company and negotiate on similar issues. The company has regular meetings or other methods for employees to express their opinions about what is happening in the company and there are active trade unions at the workplaces (in most more than one trade union). Most respondents indicated that across company workplaces most workers are members of a trade union, confirmed in the interviews showing a high extent of unionisation – between two thirds and 80%.

Nearly 60% of survey respondents indicated that the company has regular meetings or other methods for employees to express their opinions about what is happening in the company (see Table 12). This was a similar pattern of reported responses across the countries surveyed, with the proportion of workplaces with regular meetings reported to be especially high in Sweden.

**Table 12: Does the company have regular meetings or other methods for employees to express their opinions about what is happening in the company?**

	Nordic countries	NO	SE	FI
<b>Yes</b>	<b>31</b>	<b>12</b>	<b>8</b>	<b>11</b>
No	15	5	1	9
Don't know	7	2	2	3
Total	54	19	11	24

Question to both trade unionists and workers.

Similarly, nearly 60% of survey respondents indicated that there is an active trade union, works council, or similar body representing the employees in the company (see Table 13). This was a similar pattern of reported responses across the countries surveyed, with the proportion of workplaces with trade union presence reported to be especially high in Sweden.

**Table 13: Is there an active trade union, works council or similar body representing the employee of the company?**

	Nordic countries	NO	SE	FI
<b>Yes</b>	<b>30</b>	<b>14</b>	<b>5</b>	<b>11</b>
No	9	1	1	7
Don't know	15	4	5	6
Total answers	54	19	11	24

Question to both trade unionists and workers.

Around half of survey respondents reported that there are several active unions at the workplaces of the company (see Table 14). In contrast, around half reported this was not the case, which was especially noted by respondents from Norway.

**Table 14: Are there other active unions in your workplace?**

	Nordic countries	NO	SE	FI
<b>Yes</b>	<b>13</b>	<b>7</b>	<b>3</b>	<b>3</b>
No	11	0	7	4
Total answers	24	7	10	7

Question to trade unionists.

Survey respondents indicated a high level of union presence and unionisation at company's workplaces (see Table 15). In fact, most respondents indicated that across company workplaces most workers are members of the trade union. The level of unionisation was slightly lower in Finland. Furthermore, the numbers of trade union members differed across the workplaces, reflecting also their size. Such numbers ranged from 1 to 230 trade union members at a single workplace.

**Table 15: Union membership at your workplace**

	NO	SE	FI
<i>What proportion of the company's employees are covered by a trade union?</i>	50% or 100%	Most – between two thirds and 100%	One fifth to around half

Question to trade unionists.

## 4.2. Collective bargaining, social dialogue, information and consultation and industrial action in Norlandia

In terms of **collective bargaining, the trade unions in Norlandia in the Nordic countries negotiate on very similar issues**. The pattern consistent across the countries is that sectoral collective bargaining mechanisms are in place, which results apply to Norlandia. The majority of survey respondents reported that there is a formal collective bargaining mechanism at their workplaces – also the interviews confirmed this. Collective bargaining takes place on annual basis, key topic is wages and working conditions. The majority of the survey respondents and all interview partners reported a significant strength of the unions in securing their collective bargaining demands in terms of salaries and working conditions in the company. The majority of survey respondents also identified that the importance of consulting the trade unions has remained stable in the last five years. Only a small proportion of survey respondents indicated that management supports the union's work and consultation with employees – interviews show nuances: this differs by country, stronger in Norway, less so in Finland.

Overall, the majority of the survey respondents reported a significant influence of the union or consultation body in terms of salaries and working conditions in the company (see Table 16). This was reported by 21 out of 29 respondents answering this question, and was particularly frequently reported in Norway and Finland.

**Table 16: How significant do you consider the influence of the union or consultation body in terms of salaries and working conditions in the company?**

	Nordic countries	NO	SE	FI
<b>Significant</b>	<b>21</b>	<b>11</b>	<b>0</b>	<b>10</b>
Neutral	5	1	1	3
Not significant	3	0	0	3
Total	29	12	1	16

Question to trade unionists.

**Table 17: Do you believe that management supports the union's work and consultation with employees?**

	Nordic countries	NO	SE	FI
Yes	6	4	1	1
<b>No</b>	<b>12</b>	<b>3</b>	<b>0</b>	<b>9</b>
Don't know	11	5	0	6
Total answers	29	12	1	16

Question to trade unionists.

However, only a small proportion of survey respondents indicated that management supports the union's work and consultation with employees (see Table 17). Around half of the respondents believed this was not the case, and a third of respondents did not know the answer to this question. The pattern was similar across the three countries covered.

This strong influence of trade unions in determining the working conditions in the company is also reported with respect of various aspects of working conditions being determined with trade union participation (see Table 18). Also, the various aspects of working conditions are determined by both national wage mechanisms and company specific arrangements.

**Table 18: How are the working conditions determined in Norlandia?** Nordic countries

Topics	National wage mechanisms	Company specific arrangements	With trade union participation	Without trade union participation
Wages	8	5	9	3
Working time	4	7	8	0
Work intensity	2	7	2	1
Adjustments to the physical environment at work	2	5	9	1
Work-life balance and working time flexibility	2	5	6	1
Professional categories	7	5	3	2
ICT usage and privacy rights (tablets, ICT mobile devices, etc.)	4	5	3	3
Access and provision of training	3	8	7	3
Measures to ensure equal treatment and non-discrimination	2	5	3	1
Promotion	2	6	1	1
Job security	5	3	6	3
Implementation of quality standards	3	7	1	1
Health and safety standards	3	4	5	3
Staff ratio	6	5	5	1

Question to trade unionists. Multiple choices to the question were possible.

The majority of survey respondents reported that there is a formal collective bargaining mechanism at their workplaces (see Table 19). This was the case as reported over 70% respondents. The patterns are similar across the three countries covered. Also, the trade unions are involved in the formal collective bargaining mechanisms at the company's workplaces, as reported also by the majority of the survey respondents (see Table 20). In all countries, the collective bargaining takes place on an annual basis (see Table 21), with some specificities per country as identified in the interviews with the trade union representatives

in the three countries. The collective agreements negotiated and their results are binding to all company workers.

**Table 19: Is there a formal collective bargaining mechanism in your workplace?**

	Nordic countries	NO	SE	FI
<b>Yes</b>	<b>23</b>	<b>5</b>	<b>7</b>	<b>11</b>
No	0	0	0	0
Don't know	9	1	3	5
Total	32	6	10	16

Question to trade unionists.

**Table 20: if yes, are your trade union directly involved in it?**

	Nordic countries	NO	SE	FI
<b>Yes</b>	<b>20</b>	<b>4</b>	<b>6</b>	<b>10</b>
No	3	1	1	1
Don't know	0	0	0	0

Question to trade unionists.

**Table 21: How often does it take place?**

NO	SE	FI
Annually	Annually	Annually
Every 2 years	1-2 years	Every 4 years

Question to trade unionists.

**Table 22: Are the collective agreements binding to all company workers?**

	Nordic countries	NO	SE	FI
<b>Yes</b>	<b>15</b>	<b>4</b>	<b>3</b>	<b>8</b>
No	0	0	0	0
Don't know	8	2	4	2

In addition to formal negotiations, in all the countries trade unions are informed or consulted in other ways by the management on working conditions or employment related issues (see Table 23). The majority of survey respondents also identified that the importance of consulting the trade unions has remained stable in the last five years (see Table 24). The patterns were similar across the three countries.

**Table 23: Apart from formal negotiations, is your trade union informed or consulted in other ways by the management on working conditions or employment related issues – for example through a works council?**

	Nordic countries	NO	SE	FI
<b>Yes</b>	<b>23</b>	<b>5</b>	<b>7</b>	<b>11</b>
No	0	0	0	0
Don't know	0	0	0	0

**Table 24: Has the importance attached to consulting trade unions in this company increased / decreased / remained stable in the last 5 years?**

	Nordic countries	NO	SE	FI
Increased	4	1	0	3
Decreased	8	2	2	4
<b>Stable</b>	<b>21</b>	<b>2</b>	<b>8</b>	<b>11</b>

The main issues covered in the collective bargaining negotiations relate to wages and working conditions (see Table 25). Other topics frequently covered in the collective bargaining are health and safety standards and the staff ratio. In contrast, the topics least covered in the collective bargaining are the implementation of quality standards, professional categories and the ICT usage and privacy rights (tablets, ICT mobile devices, etc.). The patterns are similar across the countries.

**Table 25: What employment and working conditions are typically covered in the collective bargaining?**

Topics	Nordic countries	NO	SE	FI
<b>Working time</b>	<b>20</b>	<b>6</b>	<b>5</b>	<b>9</b>
<b>Wages</b>	<b>16</b>	<b>3</b>	<b>5</b>	<b>8</b>
<b>Health and safety standards</b>	<b>14</b>	<b>3</b>	<b>4</b>	<b>7</b>
<b>Staff ratio</b>	<b>11</b>	<b>2</b>	<b>3</b>	<b>6</b>
Access and provision of training	10	4	2	4
Job security	10	1	4	5
Adjustments to the physical environment at work	9	3	2	4
Measures to ensure equal treatment and non-discrimination	8	3	1	4
Work intensity	6	2	1	3
Promotion	6	2	1	3
Work-life balance and working time flexibility	5	1	2	2
Implementation of quality standards	6	0	2	4
Professional categories	5	1	2	2
Others	3	0	1	2
ICT usage and privacy rights (tablets, ICT mobile devices, etc.)	2	0	2	0

Question to workers and trade unionists.

A very small proportion of survey respondents reported protests occurring in the company (including industrial action, strikes, protests or other forms) (see Table 26). No such forms of protests were reported by the majority of survey respondents, and the pattern was similar across all three countries.

**Table 26: Have there been industrial actions, strikes, protests or other forms of protest in this company in the last 5 years?**

	Nordic countries	NO	SE	FI
Yes	5	2	1	2
<b>No</b>	<b>22</b>	<b>2</b>	<b>7</b>	<b>13</b>
Don't know	6	3	3	0
Total answers	33	7	11	15

Question to workers.

## 5. Conclusions

Key worker concerns in Norlandia relate to the wages which are below average. The main concerns expressed by a majority of workers surveyed for the research were the unsatisfactory level of **wages, time pressures** to undertake job tasks at the right speed and **the lack of enough workers** at the facility that the workers are working in. The majority of workers also expressed concerns about the lack of training to undertake their job properly and the lack of good prospects for career advancement. The working conditions in the company are considered to be **below the average compared to other similar companies** - especially for wages. A significant number of workers in the survey reported that the company has **introduced cost saving measures** in the last year. This was echoed in the interviews with trade unions – especially concerns about wages. The company has also been putting in place cost saving measures to be competitive.

**Several physical OSH issues** remain to be addressed, with the main pattern consistent across the countries. Survey results indicate a significant extent of OSH problems in the company - about half of the workers responding to the survey indicated that they or their colleagues experienced OSH problems in the last year. The most important OSH issues related to physical hazards, such as lifting or moving people or heavy loads and increased risks of slips, trips and falls. Main OSH issues are not considered to be handled well by the company. The majority of workers responding to the survey reported being very well and well informed when it comes to occupational health and safety risks.

**The impact of the COVID-19 pandemic** has been similar for the workforce in Norlandia across the Nordic countries. The most frequently reported impact related to the increased provision



of personal protection equipment and new safety and hygiene protocols; confirmed by interviews. In contrast, the impact on the working intensity, more working hours or staff ration were not identified by the survey respondents. Views on the quality of company's response to the COVID-19 crisis are mixed: over 40% of respondents saw the company's response being very adequate and adequate, with a large proportion of respondents who had a neutral opinion on this matter. Trade unions were consulted on the company's response.

Norlandia has **a strong union presence**, with pattern consistent across the Nordic countries. Trade unions play a strong role in the company and negotiate on similar issues. Nearly 60% of survey respondents indicated that the company has regular meetings or other methods for employees to express their opinions about what is happening in the company and there are active trade unions at the workplaces (in most more than one trade union). Most respondents indicated that across company workplaces most workers are members of a trade union, confirmed in the interviews showing a high extent of unionisation – between two thirds and 80%.

In terms of **collective bargaining, the trade unions negotiate on very similar issues**. The pattern consistent across the countries is that sectoral collective bargaining mechanisms are in place, which results apply to Norlandia. The majority of survey respondents reported that there is a formal collective bargaining mechanism at their workplaces – also the interviews confirmed this. Collective bargaining takes place on annual basis, key topic is wages and working conditions. The majority of the survey respondents and all interview partners reported a significant influence of the union or consultation body in terms of salaries and working conditions in the company. The majority of survey respondents also identified that the importance of consulting the trade unions has remained stable in the last five years. Only a small proportion of survey respondents indicated that management supports the union's work and consultation with employees – interviews show nuances: this differs by country, stronger in Norway, less so in Finland.

## Further sources of information

The Group website: <https://nhcgroup.org/>

The websites of four companies:

<https://norlandia.no/en/om-oss>

<http://norlandiabarnehagene.no/>

<https://www.aberia.no/>

<https://herogroup.no/>

Group financial information: <https://newsweb.oslobors.no/search?issuer=NHC:12562>

2019 annual report: <https://newsweb.oslobors.no/search?issuer=NHC:12562>

2016 annual report: [https://norlandia.se/sv/resources/nhc\\_ar2016.pdf](https://norlandia.se/sv/resources/nhc_ar2016.pdf)

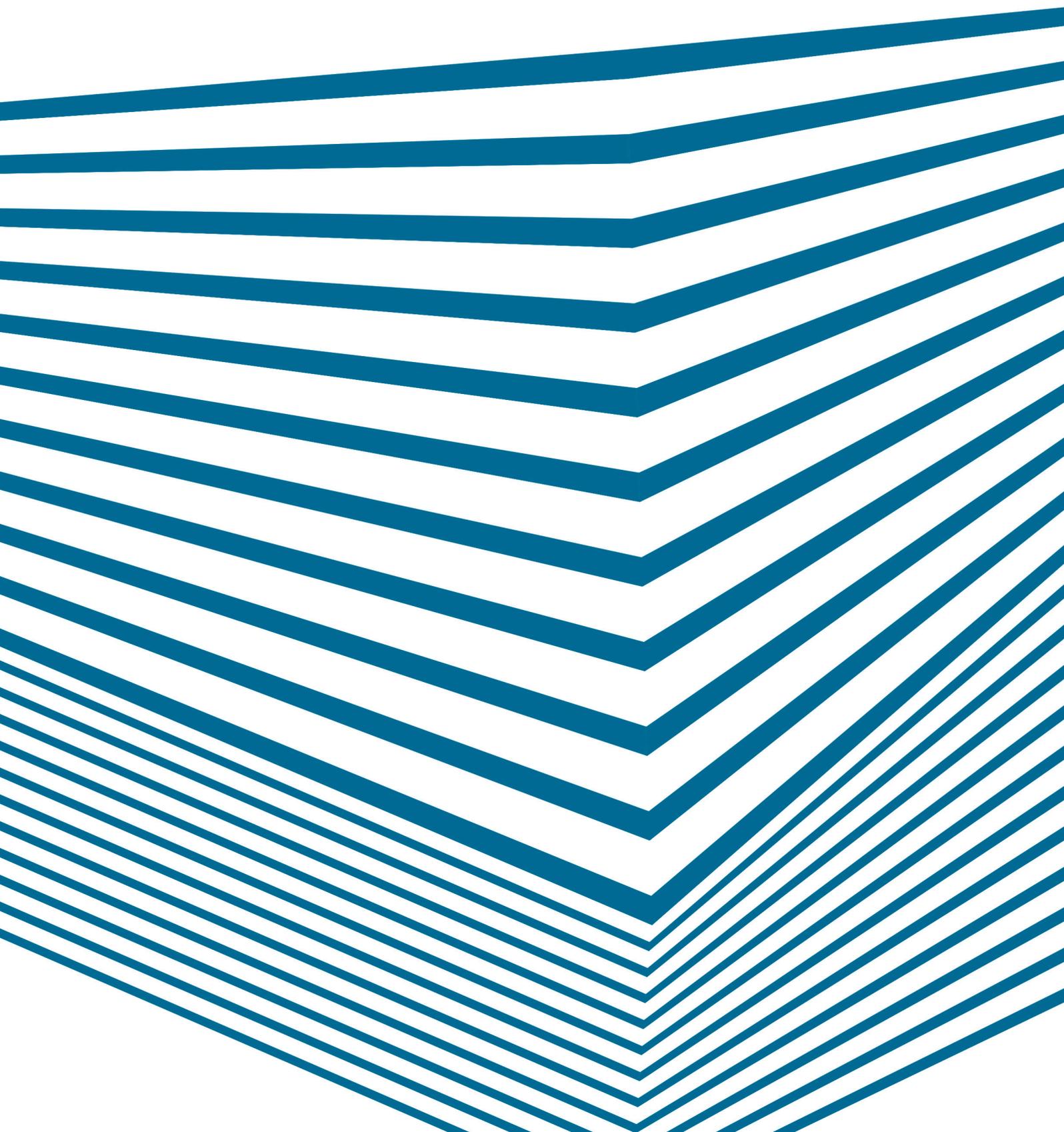
2014 annual report: <https://norlandia.se/sv/om-oss/aktuelt/norlandia-care-group-as-increased-turnover-by-31>

2015 annual report: <https://news.cision.com/norlandia-sverige/r/norlandia-care-group-has-increased-turnover-by-61-,c2360511>

**Trade unions contacted for interviews: JHL, ERTO, TEHY, SUPER (Finland), NUMGE (Norway), Kommunal and SAHP/Vårdförbundet (Sweden).**

## References

- <sup>1</sup> From December 20, 2016, the Group is officially known as Norlandia Health & Care Group AS.
- <sup>2</sup> <https://nhcgroup.org/>
- <sup>3</sup> <http://norlandiabarnehagene.no/>
- <sup>4</sup> <http://norlandiabarnehagene.no/Informasjon/BarnehageListe>
- <sup>5</sup> <https://www.abilia.no/om-abilia/>
- <sup>6</sup> <https://herogroup.no/>
- <sup>7</sup> <https://norlandia.no/en/barnehager#!&country=Norge&area=>
- <sup>8</sup> <https://norlandia.no/en/hotel#>
- <sup>9</sup> <https://norlandia.no/en/hotel#>
- <sup>10</sup> <https://norlandia.no/en/eldreomsorg#!&country=Norge&area=>
- <sup>11</sup> <https://norlandia.no/hjemmetjenester>
- <sup>12</sup> BPA should be tailored for the user: the BPA user can choose who to have as an assistant, what kind of tasks they have help with, and when to perform these tasks.
- <sup>13</sup> EBITDA stands for "Earnings before Interests, Taxes, Depreciation and Amortisation, and is a commonly used term in the financial accounts to refer to company's gross profit before tax.
- <sup>14</sup> <https://newsweb.oslobors.no/search?issuer=NHC:12562>
- <sup>15</sup> AS stands for a limited liability company.
- <sup>16</sup> Annual Report 2019.
- <sup>17</sup> [Early Childhood Education and Care | Eurydice \(europa.eu\)](#) ; [OECD – Thematic Review of Early Education and Care Policy in Norway 2015 - regjeringen.no](#)
- <sup>18</sup> [Early Childhood Education and Care | Eurydice \(europa.eu\)](#)
- <sup>19</sup> ESPN (2018) Thematic report on long-term care, Norway. [Publications and documents - Employment, Social Affairs & Inclusion - European Commission \(europa.eu\)](#)
- <sup>20</sup> ESPN (2018) Thematic report on long-term care, Finland. [Publications and documents - Employment, Social Affairs & Inclusion - European Commission \(europa.eu\)](#)
- <sup>21</sup> Eurofound (2020), Long-term care workforce: Employment and working conditions, Publications Office of the European Union, Luxembourg
- <sup>22</sup> As part of this research project, a survey of workers and trade union representatives was conducted in Norlandia units in Norway, Sweden and Finland in late 2020-early 2021. A total of 55 responses to the survey were received.





**EPSU** is the **European Federation of Public Service Unions**. It is the largest federation of the ETUC and comprises 8 million public service workers from over 250 trade unions across Europe. EPSU organises workers in the energy, water and waste sectors, health and social services and local, regional and central government, in all European countries including the EU's Eastern Neighbourhood. It is the recognised regional organisation of Public Services International (PSI).

[www.epsu.org](http://www.epsu.org)

EPSU works with affiliates in a number of multinationals in the utilities and health and social care sectors. For more information, please contact **Jakob Embacher**, Policy staff - Utilities (energy, waste, water), European Works Councils and Enterprise Policy:

[jembacher@epsu.org](mailto:jembacher@epsu.org)

+32 2 250 10 47

This report is published as part of the project: "Building European Works Councils and Employers' Networks in Health and Social Services II", coordinated by the European Federation of Public Service Unions - EPSU

With financial support from the European Commission

