



**Company profiles**

# **Norlandia and Colisée**

**Summary report**

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**Inga Pavlovaite and Pablo Sanz de Miguel**

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## Introduction

The report presents a summary of the key findings of research on the multinational care companies – Norlandia and Colisée that was carried out as part of the European Commission-funded project, “Building company networks and EWCs in health and social services II”, coordinated by the European public service trade union federation – EPSU.

The report is based on desk research on the publicly available information about the two companies and on publications focused on sectoral regulation and industrial relations patterns in the European countries where the two companies operate. In addition, an online surveys of workers, trade union representatives and members of works councils were carried out along with interviews with works council members and trade union officers. The main purpose of the survey and the interviews was to gather information on working conditions at Norlandia and Colisée.

The key findings are summarised below and further information is available in separate in-depth reports on each company.

## Colisée

Established in 1976, Colisée is a multinational company headquartered in France specialising in elderly care. It has expanded significantly in recent years with acquisitions in France, Belgium, Spain, Italy and China. By 2021, the group had 19,000 employees in France, Belgium, Italy and Spain, becoming the fourth biggest player in Europe in the elderly care sector<sup>1</sup>.

In 2017, the private equity firm IK Investment Partners became the major shareholder of Colisée Group, reflecting a trend of investment funds targeting the elderly care sector<sup>2</sup>, attracted by the expansion in demand as a result of a rapidly ageing population and the extent to which the sector was open to private operators. IK had previously invested in some of the biggest Nordic companies providing elderly care, such as Attendo, but changed strategy in 2016 probably in response to public debates, particularly in Sweden, calling for more state control of private entities providing public services<sup>3</sup>.

The backing of IK allowed Colisée to expand internationally with the acquisition of the Belgian group Armonia (including also La Saleta in Spain), the Spanish groups STS and Iseñor in Italy. In 2020, IK sold its stake in Colisée to the Swedish private equity firm EQT Infrastructure<sup>4</sup> which has a portfolio of companies across the world, with a combined total turnover of more than €27 billion and more than 159,000 employees. In autumn 2020, it became the major stakeholder of Colisée<sup>5</sup>.

**WORKING CONDITIONS** A survey of workers and trade union representatives was carried out in late 2020, along with interviews with trade union representatives and officers. The key patterns in terms of working conditions are difficult to compare because of the disparity of responses in each country in the survey (25 in Spain, only two for France and one each for Italy and Belgium)

In terms of working conditions, the main concerns expressed by workers and works council members related to wages (either below the national/sectoral average or assessed to be too low considering the type of work and qualified required), working time and work intensity.

Several health and safety problems were identified. These included psychosocial risks relating to time pressures, having to work for too long, irregular hours and the fear of job loss; and physical problems, with a lack of ergonomically checked workplaces and the impact of repetitive movements and the adoption of harmful positions. Less consistently, workers also reported having to deal with difficult customers as an issue.

The impact of the COVID-19 pandemic led to an increase in work activity with concerns about additional working hours and overtime. Overall the survey suggested that workers found company responses to be adequate or partly adequate and there was some indication in Belgium and Italy that unions did have some involvement in the response to COVID-19 crisis.

The four European countries where Colisée operates show some similarities in terms of the sectoral regulatory framework, with regional governments/institutions playing a key role in the regulation, accreditation and supervision of private providers of elder care. This does mean, however, that, in each country, there are regional disparities in terms of employment and working conditions.

In terms of industrial relations, there is a robust collective bargaining structure in Belgium, France and Spain where comprehensive national sectoral collective agreements regulate general employment and working conditions, with Belgium and Spain also having regional collective agreements. However the situation is much more complex in Italy, where collective bargaining is more fragmented, partly because of institutional specificities (i.e., lack of legal representativeness criteria for trade unions). At company level, there is a consolidated trade union presence in Belgium, France and Spain but representation at company level is particularly challenging in Italy because of employers' strategies relying on complex subcontracting chains.

### **Norlandia**

Norlandia is a privately-owned multinational company headquartered in Oslo, Norway with operations also in Sweden, Finland, the Netherlands, Germany and Poland. It was established in the 1990s and evolved through several stages into the NHC Group (established in 2016). The company provides care services including residential and non-residential social care, nursing homes, health care, pre-schools, integration services, and individual and family services.

Most company locations are in Norway and Sweden, with a smaller presence in the other countries. Operations in Norway cover all services while it is mostly pre-schools and care in Sweden and Finland and just pre-schools in the Netherlands and Poland.

In 2020, the group employed around 9,700 employees, making it one of the larger providers of care services in northern Europe, with most employees in the pre-school segment.

**WORKING CONDITIONS** A survey was conducted among company workers and trade union representatives in the main countries – Norway, Sweden and Finland – in late 2021, as well as qualitative interviews with trade union representatives. This revealed some consistency in working conditions amongst the three countries. The main worker concerns related to some wage levels being below average, pressure of work and understaffing, lack of training to undertake the job properly and lack of good prospects for career advancement. The working conditions in the company are considered to be below average compared to other similar companies – especially for wages. A significant number of workers in the survey reported that the company had introduced cost saving measures in the last year. This was echoed in the interviews with trade union representatives – especially the concerns about wages.

The survey results revealed some health and safety issues with about half of workers indicating that they or their colleagues had experienced problems in the previous year. The main concerns related to physical hazards, such as lifting or moving people or heavy loads and increased risks of slips, trips and falls. The majority of workers responding to the survey reported being well or very well informed on safety risks but there was some concern about issues not always being effectively handled by the company.

The impact of the COVID-19 pandemic has been similar for workers 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 the interviews. In contrast, impacts on work intensity, working hours or staffing levels were not identified by 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 adequate, with a large proportion having a neutral opinion on this matter.

There is a strong trade union presence in the three Nordic countries with trade unions playing an important role in the company and negotiating 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 the company and there are active trade unions at workplace level (in most more than one trade union). On the basis of the survey union density across the company can be estimated at between two thirds and 80%.

In terms of collective bargaining, the trade unions negotiate on very similar issues across the three countries, with sectoral collective bargaining mechanisms place. The majority of survey respondents and interviewees confirmed formal collective bargaining mechanisms are also in place at workplace level. The majority of survey respondents and all interviewees reported a significant influence of the union on 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.

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<sup>1</sup> <https://www.colisee-group.com/en/key-datas-and-concrete-actions/>

<sup>2</sup> <https://www.knightfrank.com/research/european-healthcare-elderly-care-market-2020-6902.aspx>

<sup>3</sup> <https://www.reuters.com/article/sweden-privateequity-idUSL5N0MP3A020140404>

<sup>4</sup> <https://www.privateequitywire.co.uk/2020/08/31/289043/ik-investment-partners-sell-colisee-egt>

<sup>5</sup> <https://www.colisee-group.com/en/team/>



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).

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EPSU works with its affiliates in a number of multinationals in the utilities and health and social care sectors. For further information contact Jakob Embacher, policy staff – utilities (energy, waste, water), European works councils and company policy: [jembacher@epsu.org](mailto:jembacher@epsu.org) +32 2 250 10 47