Nordic Growth Sectors – How can working life policies contribute to improving the framework conditions?

Nordic Growth Sectors – How can working life policies contribute to improving the framework conditions?

**Key findings and policy recommendations
of the Nordic Council of Ministers' Globalisation Project**

Lars Foldspang, DAMVAD (red.)

Peter Lange, DAMVAD

Kristian Mørk Puggaard, DAMVAD

Erik Magnus Sæther, Oslo Economics

Line Bakken, Oslo Economics

Per Kongshøj Madsen, Aalborg Universitet

Gunnel Hensing, Göteborgs Universitet

Benedicte Brøgger, Arbeidsforskningsinstituttet

Berit Sundby Avset, SINTEF

Nordic Growth Sectors –

How can working life policies contribute to improving the framework conditions?

Key findings and policy recommendations of the Nordic Council of Ministers'
Globalisation Project

Lars Foldspang, DAMVAD (red.), Peter Lange, DAMVAD, Kristian Mørk Puggaard, DAMVAD, Erik Magnus Sæther, Oslo Economics, Line Bakken, Oslo Economics, Per Kongshøj Madsen, Aalborg Universitet, Gunnel Hensing, Göteborgs Universitet, Benedicte Brøgger, Arbeidsforskningsinstituttet and Berit Sundby Avset, SINTEF

Nord 2013:006

ISBN 978-92-893-2573-8

<http://dx.doi.org/10.6027/Nord2013-006>

© Nordic Council of Ministers 2013

Layout: Hanne Lebech

Coverphoto: ImageSelect

Photo: ImageSelect

Print: Rosendahls-Schultz Grafisk

Copies: 216

Printed in Denmark

This publication has been published with financial support by the Nordic Council of Ministers. However, the contents of this publication do not necessarily reflect the views, policies or recommendations of the Nordic Council of Ministers.

www.norden.org/en/publications

Nordic co-operation

Nordic co-operation is one of the world's most extensive forms of regional collaboration, involving Denmark, Finland, Iceland, Norway, Sweden, and the Faroe Islands, Greenland, and Åland.

Nordic co-operation has firm traditions in politics, the economy, and culture. It plays an important role in European and international collaboration, and aims at creating a strong Nordic community in a strong Europe.

Nordic co-operation seeks to safeguard Nordic and regional interests and principles in the global community. Common Nordic values help the region solidify its position as one of the world's most innovative and competitive.

Nordic Council of Ministers

Ved Stranden 18

DK-1061 Copenhagen K

Phone (+45) 3396 0200

www.norden.org

Contents

Preface	7
Introduction	11
1. Summary of the analyses.....	15
2. Megatrends in the Nordic labour markets	25
2.1 Ageing.....	26
2.2 Globalisation.....	27
2.3 Gender balance.....	31
2.4 Education - demand for qualifications	32
3. The state of work well-being in the Nordic countries.....	37
4. Case study: Nanotechnology	41
5. Policy recommendations.....	43
5.1 Introduction.....	43
5.2 Methodology.....	43
5.3 Labour market policy recommendations.....	44
5.4 Work well-being recommendations.....	48
Sammenfatning.....	55

Preface

This report is the final result of one of the large scale projects initiated by the Nordic Council of Ministers in 2010 as part of the globalisation initiative “Health and welfare” focusing on the challenges of globalisation faced by the Nordic countries within this area. This present project has analysed how working life policies can contribute to improving the framework conditions of Nordic growth sectors.

To carry out the analysis, the Nordic Council of Labour and Employment Ministers entered into a contract with a Nordic consortium headed by DAMVAD. The consortium has produced five working papers investigating key issues related to this question. The working papers are published at damvad.com/nordic-growth and address an identification of the competitive job creators and their drivers of growth, the demand for and the match of competences among the competitive job creators, as well as their work environment. The working papers are based upon an extensive empirical analysis of interviews, survey data, and register-based data from several thousand Nordic growth companies.

This final report presents a summary of the five working papers and a number of evidence-based policy recommendations based on the working papers as well as on two rounds of discussions among key stakeholders in a Nordic Policy Forum established for the occasion. These recommendations address the company level, the government level, and the Nordic level within the areas of labour market and work well-being/work environment.

As to the labour market area, it is recommended to increase incentives to remain in the labour force, diminish administrative burdens related to international recruitment and improve possibilities for international students to work in all the Nordic countries after graduation as well as better prepare recently graduated people to enter the workforce.

As to the area of work well-being, it is recommended to systematically gather and publish data on key performance indicators of psychosocial well-being at company level, gather and share best Nordic practices of methods and measures for handling and improvement of this area at national level, and to

initiate cross-Nordic initiatives with the aim to coordinate better efforts and cooperation within this area. It is also recommended to improve measures regarding the balance of family and work life, including flexible working hours and flexible opening hours in kindergartens, and to carry out cost-benefit analyses to illustrate the added value of a high level

of work well-being.

It is my hope that in particular Nordic governments and the Nordic Council of Ministers will make full use of these important results and ensure a thorough follow-up of the recommendations contributing to the best possible framework conditions for our Nordic competitive job creators.

A handwritten signature in dark ink, appearing to read 'Dagfinn Høybråten', with a stylized, flowing script.

Dagfinn Høybråten
Secretary General
Nordic Council of Ministers

Introduction

The Nordic welfare states are facing new challenges in an increasingly globalised world. Fiercer competition has underlined the need for the Nordics to enhance competitiveness – and to support and nurse growth in industry and businesses.

This paper was written as a part of the project “Nordic growth areas” which is a project commissioned by the Nordic Council of Ministers. The project's purpose is to provide new knowledge on how the Nordic countries can support (and benefit from) new high-growth areas through improving framework conditions in the labour market, education/research and industrial policy. The project aims at stimulating knowledge sharing between the Nordic countries. In addition, the project covers the field of nano technology as a special case. The overarching purpose of the project is to develop recommendations concerning policies, which strengthen the conditions for growth and job creation in the Nordic countries. The objective, therefore, is to optimise framework conditions, allowing the Nordic countries to better benefit from these areas of growth – and, ultimately, contribute to ensuring the Nordic welfare states.

The analysis has been conducted by a consortium comprising experts from Nordic knowledge and research institutions, led by DAMVAD. The two-year project has been conducted on firm

methodological ground, making use of a register-based analysis, a survey, and qualitative interviews. Five working papers, a covernote and this final report are downloadable from the webpage www.damvad.com/nordic-growth.

The partners are: DAMVAD, Oslo Economics, Jari Kuusisto and Martin Meyer (University of Vaasa, SC-Research), The Norwegian Work Research Institute, Gunnel Hensing (prof., University of Gothenburg), Per Kongshøj Madsen (prof., Aalborg University) and SINTEF (The Foundation for Scientific and Industrial Research at the Norwegian Institute of Technology).

Glossary

In the following, the paper operates with two central definitions:

Competitive job creators

The competitive job creators are found through the statistical register-based analysis performed during this study (see appendix of working paper 2 for more information).

They are identified by using two criteria. Firstly, the companies must have generated new employment, hence experienced growth in employment during a selected period from 1999–2008. Secondly, only the companies among the 25% most productive in their

own industry are selected. See working paper 2: “The competitive job creators” for a more detailed description.

Growth companies

It is not possible through the survey to precisely identify the competitive job creators as they are defined by very detailed criteria in the statistical register-based analysis as described above. Thus, the term “growth companies” is used when reporting results from the survey and interviews, and will serve as an approximation for the competitive job creators.

The growth companies are found through the survey performed among companies in the Nordic countries, and segmented according to sector, size, and geography based on the register-based analysis. This is done to be able to target the areas with a high number of growth companies. Companies having experienced growth in the number of employees in their country during the last three years are defined as growth companies. Furthermore, the interviewed companies are all selected on the basis of their growth, hence they are all growth companies.

1. Summary of the analyses

Our work and analysis has evolved around the following questions:

- Who are the Nordic growth companies?
- What characterises the growth companies' demand for labour?
- How can framework conditions improve the match of supply and demand for labour in the growth companies?

To answer these questions we have conducted a number of analyses based on different methodologies. The analysis combines insight from a series of interviews with companies, labour market organisations and policy makers in each of the five Nordic countries with two surveys – one of companies and one of employees in growth sectors. Furthermore, a register-based analysis of the competitive job creators has been performed. Our analyses and findings are documented in five working papers. In the following, we will summarise the findings from these five papers. The working papers as well as a covernote and this final report are downloadable from the web page www.damvad.com/nordic-growth.

Working Paper 1: Framework conditions for high-growth industries in the Nordic countries, surveys the existing literature on existing framework conditions within the realms of labour

market policy, work well-being, and educational and industrial policy.

There are a number of important megatrends in the labour market, which the competitive job creators must consider. Among these are the ageing of the workforce; the increasingly multiethnic character of the workforce; the increasing share of female employees with higher education; the forces of globalisation; a lesser need for workers to be present at their workplace; and a polarisation of the workforce when it comes to qualifications. These megatrends – notably globalisation, ageing of the workforce and the increasing share of female workers with higher education – lead to important changes in the framework conditions for the competitive job creators.

Analyses focusing on work well-being in growth sectors are not common in the literature, making the present analysis rather new of its kind – and existing literature is reviewed in this light. Important overall considerations in modern Nordic workplaces are psychosocial imbalances, and the dual earner society of the Nordics, leading to great challenges in combining work and family life. Compressed work hours, long hours and precarious employment are found to be important imbalance factors.

With regards to educational and industrial policies, important differences are found among the

Nordic countries. Firstly, Norway is a front runner when it comes to actually educating entrepreneurship. Secondly, to overcome the mismatch of supply and demand of qualifications, the Nordics have developed very different strategies – with Finland being the most radical, as it forecasts the needs for different types of candidates on a very formal basis. Thirdly, whereas all of the Nordics have a strong focus on growth and competitiveness in their industrial policies, Denmark seems to be a frontrunner with regards to a start-up-friendly environment.

Working Paper 2: Competitive job creation, identifies the areas of growth in the Nordic countries, and presents an analysis of drivers for growth. The analysis builds upon register-based micro data from the Nordic central statistical bureaus.

Competitive job creators (“growth companies”) are found in several

industries – some thriving, others in decline. An important finding is that there are entire industries, which are prosperous, while in others, there is a great deal of polarisation

Moreover, in working paper 2, education (secondary and tertiary), tangible assets, and exports are found to be important drivers of productivity. Further, the paper shows that increasing the share of staff with a tertiary education is much more effective in boosting productivity in highly productive companies than in less productive ones, whereas the opposite is true with regards to investments in tangible capital assets, which tend to boost productivity more in the less productive companies than in the most productive ones. Therefore, companies wishing to boost productivity should invest in tangible assets first, well-educated staff second, cf. figures 1 and 2.

Figure 1. Relationship between fixed capital assets and productivity (quantile regression). Swedish companies ordered by percentiles of the productivity distribution

Source: Our calculations, based on data from the Nordic statistical central agencies.

Note: Graphs depict the strength of the relationship between fixed capital assets and productivity within percentiles of the productivity distribution of companies (X-axis).

Figure 2. Relationship between tertiary education and productivity (quantile regression). Danish companies ordered by percentiles of the productivity distribution

Source: Our calculations, based on data from the Nordic statistical central agencies.

Note: Graphs depict the strength of the relationship between share of staff with tertiary education and productivity within percentiles of the productivity distribution of companies (X-axis). Dotted lines on the sides of the graph depict 95% confidence interval.

Figure 3. Relationship between initial share of tertiary education and employment growth over 4-year period, (quantile regression). Swedish companies ordered by percentiles of the employment growth distribution

Source: Our calculations, based on data from the Nordic statistical central agencies

Note: Graphs depict the strength of the relationship between share of staff with tertiary education and employment growth within percentiles of the employment growth distribution of companies (X-axis). Dotted lines on the sides of the graph depict 95% confidence interval.

The results do not point as clearly to a place to start with regards to employment growth, cf. figures 3 and 4. Tertiary (and not so much secondary) education and exports are important drivers of employment growth. So are intangible assets, but only for companies that are

already fast growers. For slower growers, intangible and tangible assets alike are less likely to be related to increased growth rates. Also, tertiary education is less strongly associated to employment growth for the slower growers than it is for the fast growers.

Figure 4. Relationship between initial fixed capital assets and employment growth over 4-year period (quantile regression). Norwegian companies ordered by percentiles of the employment growth distribution

Source: Our calculations, based on data from the Nordic statistical central agencies.

Note: Graphs depict the strength of the relationship between fixed capital assets and employment growth within percentiles of the employment growth distribution of companies (X-axis). Dotted lines on the sides of the graph depict 95% confidence interval.

Working Paper 3: Demand and supply of labour in the competitive job creators, surveys and interviews company management and employees as well as relevant organisations, labour market parties and policy makers.

The paper shows that competitive job creators know at least part of the lesson from working paper 2 – or rather, they act as if they do, and hire highly educated

people to a larger extent than other companies.

Even if growth companies do hire a larger share of highly educated people, they find it difficult to find employees with the right skills. In all of the countries, the growth companies are more inclined to have difficulties finding people with the right competences than similar non-growth companies.

This implies a threat to the potential for the growth companies to fulfil their potentials.

It is furthermore an observation that the growth companies rank social skills more important – in the hiring situation – than technical or methodological competences. This can be explained by the fact that the interviewed growth companies underline how education and skills are considered a prerequisite for the candidates to be attractive and a ticket to the job interview, where social skills and “being the right person” are the characteristics looked for when at the interview.

Policy makers and companies are very much in opposition to one another regarding the issue of ageing of the workforce. Whereas government organisations and labour market organisations predict that the ageing of the workforce will set an important limit to recruitment in the future, importantly, companies disregard this as an important factor. This might be explained by the fact that the competitive job creators identified in the analysis employ staff with an average age around 40 years, suggesting that the competitive job creators will not have to face shortages in labour supply for a number of years to come. Also, the issue of the ageing of the population is expected to have an impact in the longer run and not in the near future. Political organisations and labour market parties often tend to observe a longer time horizon than companies do, which may be part of the explanation as to why the companies do not yet see this as a challenge.

One way to work around the problem of shortages in the supply of skills seems to be by hiring international labour. However, Nordic languages and

– importantly – Nordic culture are perceived as barriers to international recruitment outside of the Nordic countries. Also, smaller companies rarely use this form of recruitment, as a significant investment in time and resources is required.

Working Paper 4: Work well-being in growth companies investigates the state of work well-being in the Nordic companies – for growth and non-growth companies for comparison purposes – how it may be improved, and how it may stimulate growth. The paper is based on a survey of companies and employees alike and on interviews with relevant policy makers, labour market parties and company management.

The literature review in Working Paper 1, as mentioned above, is confirmed in the findings of Working Paper 4. Thus, the psychosocial work environment and imbalances are reported as an important work well-being issue.

Still, companies and employees alike rate the work environment as being of relatively high quality and only few experience discomforts. This reaffirms findings in earlier studies that Nordic employees rate their work environment relatively high.

No big differences between growth and non-growth companies are found. Thus, no evidence is found in support of the work environment suffering more in growth companies than in other companies – for instance with regards to imbalance factors, problems of worklife balance, etc.

Working Paper 5: Demand for revision of framework conditions, is based on interviews with policy makers, labour market parties and company management as well as surveys of

companies and employees, like papers 3 and 4 above. The paper identifies the specific requests or demands for revisions of the framework conditions put forward by the companies and policymakers.

In the realm of the labour market, the (high) level of wages is pointed to as the most important barrier to growth in the survey of companies, but also administrative burdens when handling sick leave and benefits play an important role in all of the countries. Likewise, limitations in recruitment of foreign labour are mentioned as an important barrier.

Dismissal protection was also pointed to as one of the most important barriers in the interviews conducted among companies, but this was rated as a midsize barrier in the survey of the companies.

Regulations regarding shift work and working hours were pointed to as troublesome in the interviews with both companies and labour market organisations, and they were regarded as outdated and not in line with what is needed in modern growth companies. This is important, as less regulation (government or otherwise) may mean increasing stressors in a work well-being perspective.

However, the overall regulation of specific work well-being issues does seem to be well-functioning, and it is not regarded as a large barrier to growth. Companies do find the administrative burdens connected to work well-being regulation somewhat burdensome, but the regulation itself does not seem to be a source of trouble. This is important, as work well-being and efforts to improve this could be seen as barriers

by growth companies, as it may increase administrative costs. However, it may even stimulate growth as mentioned above – but the way regulation is carried out does have consequences for companies. This may call for more innovative and less regulation-intense ways to regulate or improve work well-being.

Companies argue in the survey that educational policy does not ensure a sufficient supply of candidates with basic competences required to work in a small or medium-sized company. This is much in line with the fact pointed to above, namely that companies find it difficult to recruit people with exactly the right competences.

The Nordic welfare states are facing new challenges in an increasingly globalised world. Fiercer competition has underlined the need for the Nordics to enhance competitiveness – and to support and nurse growth in industry and businesses.

This report presents the key findings and policy recommendations of the project “Nordic growth areas”. The objective is to contribute to an improvement of framework conditions in the labour market and work environment policy areas, allowing the Nordic countries to better benefit from their growth companies.

Having identified growth companies in the Nordics, the project analyses growth drivers, the match between supply and demand of labour, and growth and other companies’ perceptions of existing framework conditions and improvement needs.

Based on the analyses, a Nordic Policy Forum was held in Copenhagen with participation of policymakers from the

central administrations, labour market organisations, universities and growth companies, guiding the project group in developing the policy recommendations of the project.

In a very general manner, the findings of the project may be summarised as follows:

- Competitive job creators are found in industries in decline as well as among rising industries. They are found within manufacturing as well as services.
- Tertiary education, intangible capital assets and exports seem to be important drivers of employment growth for individual companies. Competitive job creators seem to know this – and hire well educated people, although, according to the survey, they regard social competences as more important than formal education e.g. technical skills, in the hiring situation. Interviews conducted show that formal education is first and foremost seen as a prerequisite to be considered as attractive for a job, but social skills, rather than academic skills, are important in the actual interview situation.
- Ageing of the workforce, globalisation pressures and an un-matched demand for qualifications are among the most important challenges to growth in the competitive job creators. Policy makers and companies are very much in opposition to one another regarding the issue of ageing of the workforce. Whereas government organisations and labour market organisations predict that ageing of

the workforce will set an important limit to recruitment in the future, importantly, companies disregard this as an significant factor.

- Growth companies also mention level of wages, dismissal protection, and overall administrative duties as important barriers to growth.
- Psychosocial imbalances, work-life balance, and a complex regulatory policy framework are among the most important challenges to ensuring a well-functioning work environment in the competitive job creators. Work well-being in the competitive job creators is at the same level as in other companies – and quite good. However, psychosocial well-being is challenged.

Policy recommendations

The policy recommendations developed are based on the results of the project and input from discussions at a Nordic Policy Forum, where members of labour market organisations, authorities, company management and researchers have participated.

Overall, the Nordic countries have well-functioning framework conditions. However, our study shows that there is potential to further improve framework conditions in order to enhance competitiveness and support growth.

Based on our analysis, we propose action in two policy areas; labour market policy and policy for work well-being. The recommendations are described further in chapter 5 below. The parentheses in the following refer to the relevant chapters.

Labour market policy

- Specifically, we propose efforts to mitigate the foreseen potential shortages of labour due to the ageing of the workforce. This calls for action and cooperation between companies and the public sector to develop strategies to increase the incentives to remain in the labour force. (5.3.1)
- Furthermore, we suggest policy to diminish administrative burdens related to international recruitment and improve the possibilities for international students to work in all the Nordic countries after graduation and not just the Nordic country they studied in. (5.3.2)
- Our analysis shows that there is an unmatched demand for qualifications in the labour force, especially regarding recently graduated. We therefore suggest measures to better prepare recently graduated to enter the workforce. (5.3.3)
- We propose that companies should systematically gather and publish data for key performance indicators of psychosocial well-being which in turn can be used to develop national “barometers”, measuring the state of the psychosocial work well-being in the Nordics. Furthermore, we propose more systematic gathering of best practice Nordic cases (business cases) of methods and measures to manage and improve psychosocial work well-being (best practice sharing). Moreover, we propose cross-Nordic initiatives regarding psychosocial work well-being and a clearer coordination of efforts and cooperation on topics related to psychosocial work well-being. (5.4.1)
- We suggest measures to balance family and work life, including flexible working hours and flexible opening hours in kindergartens. (5.4.2)
- It is furthermore recommended that the complex regulation of work well-being should be analysed in a cost-benefit analysis illustrating the added value of work-well-being rules and regulations. (5.4.3)

Policy for work well-being

Regarding work well-being, we have observed that there is a need for policy improvement in the area of psychosocial well-being in the workplace:

2. Megatrends in the Nordic labour markets

A number of important megatrends in the Nordic labour markets are found in the analyses, influencing the competitive job creators. Among these are the ageing of the workforce; the increasingly multi-ethnic character of the workforce; the increasing share of female employees with higher education; the forces of globalisation; a lesser need for workers to be present at their workplace; and a polarisation of the workforce when it comes to qualifications.

These megatrends – notably globalisation, ageing of the workforce and the increasing share of female workers with higher education – lead to important changes in the framework conditions for the growth companies. In this section, we will discuss our findings in the perspective of these megatrends in the labour market. The table below summarizes our findings from each of the project's relevant working papers (WPs). see www.damvad.com/nordic-growth

Megatrend	WP 1: Framework conditions for high-growth industries in the Nordic countries	WP 2: Competitive job creators	WP 3: Demand and supply of labour in the competitive job creators
Ageing	Can imply shortages of labour	Companies analysed have a relatively low average age of 40 years	Should retain elderly in the labour market Ageing is not perceived as a problem yet by companies
Globalisation	Increased competition for wages and jobs	Internationalisation (exporting) is an important driver of productivity and employment growth	Important to attract international labour, but language and culture is perceived as a barrier
Gender balance	Increases the potential importance of women at all levels of the job-hierarchy	The competitive job creators stand out as having a more skewed gender distribution	The labour market is gender segregated. Skills, education and experience, rather than gender, are important factors for companies*
Education, demand for qualifications	Higher educational qualifications are not always reflected in the actual job positions, leading to "over-qualification"	Positive relationship between education and productivity and between tertiary education and employment growth	Growth companies have a higher share of employees with a tertiary education. Companies identify social skills and competences as most important in the hiring situation. However, skills and education are considered prerequisites for being considered.

*Swedish and Norwegian companies are obliged by law to ensure a certain gender balance.

2.1 Ageing

One evident megatrend on the Nordic labour market, which will strongly affect the growth potential, is the ageing of the workforce and the potential shortages of labour, which follow from the demographic changes.

The ageing population will more or less influence all of the Nordic countries. Interviewed labour market organisations and government institutions express it as a “replacement need” in the future. Pension regulation and other senior policies are suggested as possible solutions. The conducted interviews with labour market organisations in the Nordic countries indicate that the ageing of the workforce and the shortages of labour predicted to follow are in general an issue ascribed a high level of importance. However, the main focus for the interviewed organisations is on the shortages of labour, which due to the economic crisis are not currently an issue, but which are predicted to occur over the next 10–15 years. The exception is Iceland, where the interviewed organisations do not currently consider the ageing of the workforce to be a major issue.

To counter the problem, increased retirement ages are planned or have already been implemented in Denmark, Norway, Sweden and Finland, and focus is now directed at finding out how employees can be encouraged to stay longer in the labour market. According to the organisations interviewed, emphasis should be put on retaining senior employees as a key resource in the companies, for example through creating more attention to the benefits of their experience as well as their network

and management competences. In the longer run, more flexible retirement schemes are pointed out as a necessity by especially the Danish and Norwegian trade unions. The schemes must be considered with incentives to remain in the workforce.

The rising average age may create a less flexible workforce, because senior employees may be less adaptable to rapidly changing internationalised labour markets. Furthermore, it could be expected that companies as well as the senior employees themselves do not wish to invest in continuing education, because they are close to retirement. According to the interviewed Danish and Finnish organisation, as a result of their relatively high wages combined with low versatility, senior employees are currently frequent victims of layoffs in both the private and the public sectors.

The impression from the conducted interviews with growth companies is, however, that the companies do not yet perceive of the ageing of the workforce as a challenge. Hence, interviewed companies explain how they try to obtain a good age balance, by having a combination of young and senior employees, all of whom fit well into the company. Furthermore, the companies explain how they try to make use of the skills and competences of older employees in particular as well as younger recently graduated ones.

Several interviewees express that age is not as important as being the right person for the job. Skills, education and experience are more important factors than a certain age, although all of the factors are to a certain extent correlated.

The statistical register-based analysis shows that the average age of employees

in companies in the Nordic countries, whether being a competitive job creator or not, is approximately 40 years. This could explain why the companies do not see age as a challenge. Also, the issue of the ageing of the population is expected to have an impact in the longer run and not in the very near future, the latter of which may be more of a central concern to company managers than the former. Political organisations and labour market organisations may be concerned with longer time horizons than company managers. The different time horizons at the centre of concern among company managers and political or labour market organisations can be part of the explanation as to why the companies do not (yet) see the ageing of the workforce as a challenge.

2.2 Globalisation

The increasing Europeanisation of the Nordic labour markets, both from an economic and a political perspective has added to the forces of globalisation, which both directly and indirectly affect the markets, leading to increased competition for wages and jobs.

Increased international interaction could come in the form of increased imports and exports of goods and services. In mainstream economic literature, exporting is regarded as a key element for companies wishing to achieve productivity and employment growth. The expected link between exports and employment growth is straight-forward, as the domestic market implies a natural

limitation on sales opportunities. Exporting, thus, is a way to increase production and thus employment. This is especially true for small economies, such as the Nordics.

Productivity, on the other hand, is expected to be affected by exporting through several channels. By entering the export market, companies are forced to adjust to a more competitive market. By entering the export market, companies will also be exposed to new technologies (through customers and competitors) which they can exploit to enhance efficiency. Lastly, entering the export market will cause output to rise (as argued above), so that companies can exploit economies of scale to a larger extent.

By testing increased globalisation (in the form of exports) as a driver of growth in our statistical analysis, we found that in all the Nordic countries there is a positive relation between exports and productivity. That is, exporting companies are – on average – more productive than companies that do not export their goods or services to other countries. This is more true for the more productive ones, i.e. the exporters have a greater lead in productivity over the non-exporters among the group of the most productive companies than in the group of the least productive ones. International integration constitutes a substantial potential to increase productivity and thereby promote growth in the Nordic countries. Not least for the relatively most productive companies, as illustrated by the quantile regressions in the figure below.

Figure 5. Relationship between exporting and productivity (quantile regression). Danish, Swedish and Norwegian companies ordered by percentiles of the distribution

Source: Our calculations, based on data from the Nordic statistical central agencies.

Note: Graphs depict the strength of the relationship between exporting and productivity within the relevant percentile of the productivity distribution of companies. Dotted lines on the sides of the graphs depict 95% confidence interval.

International integration constitutes a substantial potential to increase productivity and thereby promote growth in the Nordic countries. Although not all companies have the ability to export, there is a benefit in increasing the proportion of exporting companies in all Nordic countries.

Engaging in exporting activities is also positively related to employment growth. Thus, the estimated effect of becoming an exporter on productivity is positive and significant in all the Nordic countries. Furthermore, this applies for almost all industries across all of the Nordic countries. In more detail, the estimates show that companies that start exporting on average experienced around 4 per cent higher growth in employment during a 4-year period.

Bearing in mind that globalisation enhances growth and productivity, we have investigated in what ways globalisation affects the supply and demand for labour.

Our analysis shows that there is general agreement among the interviewed organisations that the Nordic countries' ability to attract qualified foreign labour will be important for the continued competitiveness of the Nordic economies. According to the interviewed organisations, the demand for foreign labour is especially present among exporting companies, which 1) need very specialised skills in order to remain competitive on the international markets like engineers/technical expertise and 2) look for staff with specific language and cultural

competences relevant to their respective target markets abroad or 3) demand labour for low-skilled tasks not attractive among the Nordic employees.

However, the Nordic countries are also importing foreign labour in other sectors of the economy, namely where they experience a shortage in the domestic labour supply. The construction sector is highlighted, by the interviewed organisations in Denmark, Sweden, Norway and Finland, as a sector, which is highly reliant on foreign labour. Furthermore, this is a sector identified in the register-based analysis as having a high share of competitive job creators in Sweden, Norway and Finland, but not in Denmark.

Across the organisations interviewed, it is a common perception that the Nordic economies will become increasingly dependent on specialised foreign labour and that the main concern in this regard is how the respective countries can attract the competences needed (this is to a lesser extent the case in Iceland, where the economic slowdown has led to a decrease in the demand for foreign labour). In Denmark, the lack of international schools (schools where classes are taught in other languages than Danish) and, more importantly, the lacking ability of Danish employees to accommodate and integrate non-Danish colleagues, are mentioned as potential problems in this regard. In Iceland it seems to be much easier to attract labour from EU/EEA-countries than from outside Europe.

It is, however, also clear that the Nordic languages are a barrier to the import of foreign labour. This is the case at the workplace as well as in society more generally. This does not apply, though, to intra-Nordic exchanges of

employees. The interviewees argue that the introvert nature of the Nordic countries' inhabitants constitutes a barrier when it comes to social interaction and integration between an international employee and his/her native co-workers. Furthermore, the relatively high tax burdens in the Nordic countries are seen as an obstacle to attracting some international employees, especially by the companies and employers' organisations.

Globalisation may also influence wage distribution. Traditionally, the Nordic countries have had an even distribution between white collar and blue collar workers. Increased internationalisation of companies may lead to wage differences similar to other European countries, as well as the USA and Asia.

Our analysis shows that there is a clear tendency for growth companies in all countries to have an international composition of their workforce. But there are also striking differences between the Nordic countries. Thus, Danish and Finnish surveyed companies in general have fewer non-nationals in their workforce than do Norwegian and Swedish companies. In Norway, this may reflect a high level of employment of foreign specialists in the energy-related sectors, as well as a high level of immigration to Norway in recent years. In Sweden the higher level of non-nationals in the workforce probably reflects the larger share of immigrants in the Swedish labour market compared to the other Nordic countries. The Swedish surveyed companies may have categorised these immigrants as non-national employees.

Furthermore, there is a tendency for growth companies to recruit more international workers than other

companies. Again, there are striking cross-country differences: Danish and Swedish companies appear to be much less internationally oriented in their future plans for recruitment than their Finnish and Norwegian counterparts. An alternative to international recruitment can in some cases be to move activities abroad. This strategy seems to be pursued more often by non-growth companies than by growth companies.

One possible interpretation of this is that offshoring activities act as a substitute for increasing employment in the Nordic home country, where the

company thus appears in the empirical analysis as a non-growth company (national employment in the company will not increase, and may even decrease). Another interpretation is that offshoring is in some cases a deliberate defensive strategy applied by companies facing difficulties in maintaining employment in the home country. This argument can find some support in our analysis, which shows that cost considerations play the dominant role for the decision to move activities abroad, cf. figure 6 below.

Figure 6. Reasons behind the companies' decision to move activities abroad, companies in all of the Nordic countries

Source: Survey among companies in the Nordic countries.

Interviewed organisations argue that offshoring is relevant only when a company has grown to a certain size, and as such it is not common for SMEs, especially the smaller ones, to engage in offshoring.

Furthermore the interviewees point out that offshoring is relevant merely for certain types of companies. These could be production companies moving the more unskilled parts of their production to lower cost locations, or companies with extensive use of IT-skilled personnel, particularly when it comes to lower skilled programming.

Some of the interviewed organisations mention that some of the Nordic companies which have made use of offshoring and moved part of their activities abroad before the economic crisis, have decided to move their activities back again. The reason for this is often lack of quality or less cost-efficiency than expected.

2.3 Gender balance

A third trend, which is not new to the Nordic countries, is the rising educational level of the female workforce, which increases the potential importance of women at all levels of the job-hierarchy, but also represents a risk of overqualification, if the potential of the female workers is not fully exploited. Our mapping of the competitive job creators shows that these companies stand out as having a more skewed gender distribution than the average company. This is especially the case among the Norwegian competitive job creators, which on average have a 76 per cent share of male employees, compared to an average of 65 per cent among the

Norwegian companies in general.

Furthermore, when it comes to the gender balance, the interviewed organisations highlight that in many sectors the labour market is gender-segregated and provide examples of industries with an overweight of female employees, such as in the health sector, as well as examples of industries with an overweight of male employees, such as in construction.

Based on the interviews performed, the issue of attaining a gender balance is generally of most concern in Sweden, to a slightly lesser degree in Finland and Norway, and to a smaller degree in Iceland and Denmark.

However, in all countries there is a focus on another type of gender segregation; the general lack of women in higher positions and how to respond to this. In Denmark, where quotas for women in boards have not been imposed, as opposed to Sweden and Norway, the organisations have different views on this. Some argue for the need for such quotas, while others argue that encouragement and campaigns pave the way forward. Others again argue that a larger share of women attaining higher educational degrees will solve this problem in the longer run. Further along this line, some interviewees argue that the opposite problem will be experienced in the years to come. They argue that the higher proportion of men than women currently not completing their education or obtaining lower qualifications will become a problem in the future. In general, the interviewees do not see work-life balance issues as related to the share of female workers among the staff, except for the fact that the duration of maternity leave is longer than that of paternity leave.

When interviewing growth companies across the Nordic countries, there seems to be an agreement that skills, education and experience rather than gender, are important factors when hiring new employees. Some of the interviewed companies belong to sectors predominantly male (e.g. offshore wind power) or predominantly female (e.g. communication) and argue that they actively seek to improve the gender balance when hiring, although not compromising on educational profile, skills, competences and experience.

Due to extensive focus and quotas, the interviewed Swedish and Norwegian companies seem to put a higher emphasis on attaining a gender balance, while the Danish companies more strictly argue that other factors are more important. Interestingly, however, our analysis does not show a significant effect of this on the gender balance in companies. On the contrary, the Danish companies show the most “equal” gender distribution, while Norwegian and Swedish companies show the most skewed.

2.4 Education – demand for qualifications

When it comes to the demand for qualifications, complex processes seem to be at work. On the one hand, there is a general argument that the demand for skilled and highly educated workers will continue to increase. The supply of a well-educated workforce will therefore be an important success factor for raising the growth potential of the Nordic countries. This general argument must, however, be modified by the observation of a tendency towards a polarisation of the workforce, which implies that there is a

rising number of jobs at both ends of the skills range relative to the midlevel skills – not precluding that the demand for skills here is also increasing in absolute terms. Another modifying observation is that higher educational qualifications are not always reflected in the actual job positions, leading to “over-qualification.”

The survey results indicate that growth companies in the Nordic countries in general experience more difficulties finding employees with the required skills and educational profiles than non-growth companies.

The general impression from the interviews is that difficulties finding the right employees and candidates naturally vary from industry to industry. In general, it is difficult for companies to find highly specialised experts within certain skill areas. Engineers are e.g. lacking in all of the Nordic countries according to the interviewed parties. Some Finnish ICT companies find it hard to find skilled programmers and agile developers while in Iceland some companies expressed that candidates within natural sciences are lacking, in addition to engineers.

Furthermore, it is argued by the interviewed organisations that there is a mismatch between the companies’ search for skilled personnel and the pool of unskilled workers in the five economies. Interviewed organisations find that this problem will increase over the coming years, especially following the present economic crisis. In connection to this, it is expected by interviewees that initiatives will be taken in order to further educate the unskilled labour. In time this will result in a lack of unskilled labour willing to take the low-skilled jobs.

One strategy to pursue by companies as a response to e.g. a low supply of

certain types of employees is to educate the employees and offer continuing education.

Companies and the interviewed organisations stressed the importance of an ongoing upgrading of the workforce and also the need for such activities to be conducted in close cooperation between companies and the public sector. Interviewees thus argue that there is a need for closer cooperation between educational institutions and companies in order to secure that the candidates are equipped with relevant skills and competences.

Concerning access to continuing education for employees, one could expect growth companies to be more dynamic than non-growth companies, also in this respect. This expectation is confirmed by our data, which shows that in three out of the four Nordic countries analysed¹ – Denmark being the exception – the growth companies more frequently provide opportunities for continuing education. The differences between growth and non-growth companies are not large, however, the growth companies indicate a slightly higher necessity to provide further educations than non-growth companies do.

In the register-based analysis, a positive relationship between education and productivity was found. More specifically, a larger share of staff with a secondary education (skilled and unskilled workers with high-school level education) is related to a higher level of productivity across all companies in each of the four Nordic countries analysed. Also, a larger share of staff with tertiary education (education at a level higher

than the skilled level) is related to a higher level of productivity, with a much stronger correlation than is the case with secondary education.

Also, the correlation between tertiary education and productivity is much stronger among the most productive companies than among the less productive ones. Hence, for those companies at the top of the productivity distribution (i.e. the most productive ones), it is much more important to have a large share of staff with tertiary education than it is for the companies in the bottom of the productivity distribution (the less productive ones). Or, in other words, the results indicate that education is an important driver of productivity, and much more so among the top productive companies than among less productive companies.

All of this points to framework conditions in terms of education and training as being prerequisites of paramount importance for the growth companies in the Nordic countries.

Our analysis of demand and supply of labour shows that the competitive job creators act as if they are aware of the fact that hiring higher educated employees generates productivity growth, as we observe that they hire highly educated people to a larger extent than other companies.

In all four countries analysed, the higher share of employees with a tertiary education in the competitive job creators occurs at the expense of the unskilled workers, who constitute a considerably smaller share of the employment in the competitive job creators. In Norway, only 20% of employees in competitive job

¹ The statistical register-based analysis was conducted with data from Denmark, Finland, Norway and Sweden. Unfortunately it was not possible to obtain data from Iceland.

creators are unskilled compared to an overall average of 26.3%

Recent studies have shown a strong correlation between higher education and the productivity and growth opportunities of Danish companies. The results described above suggest that this may also be the case across the Nordic countries.

The results of the survey indicate that the difference between growth and non-growth companies in the share of highly educated employees may increase. Our analysis shows that a higher percentage of the surveyed Swedish, Norwegian, Danish, and Finnish growth companies expect to be changing the composition of their workforce than is the case for the non-growth companies. In general, they expect to be hiring higher educated employees.

When asked about the relative importance of four different categories of skills and competences, the surveyed companies identify social skills and competences as the most important when hiring new employees. This can be seen in the figure below. It should be noted, however, that the interviewed growth companies underline how education and skills are considered prerequisites for the candidates to be attractive and a ticket to the job interview, where social skills and “being the right person” are

the characteristics looked for when at the interview.

As the figure shows, this is the case for both growth and non-growth companies, even though growth companies on average seem to attach marginally higher importance to social skills than non-growth companies. In general, the Swedish growth companies seem to attach the highest importance to social skills with 88% indicating this to be an important factor, when looking for future employees.

Specific technical skills and competences are especially identified as important by the Finnish companies and while approximately 50% of the Danish, Norwegian and Swedish companies identify these skills as important, and the same is the case for two-thirds of the Finnish companies. Thus, as opposed to companies in the other three countries, the surveyed Finnish companies attach higher importance to specific technical skills than to social skills and competences.

As was the case with social skills, growth companies on average seem to attach marginally higher importance to organisational and methodological skills than non-growth companies. Methodological skills and competences are rated least important by the surveyed companies.

Figure 7. Skills and competences companies expect to be looking for among future employees (percentage of companies)

Source: Survey among companies in the Nordic countries.

HEALTH INSURANCE POLICY

3. The state of work well-being in the Nordic countries

A key element in supporting growth companies may be to ensure a good and healthy work well-being. This chapter discusses the project's main findings related to work well-being, which are further discussed in working paper 4.

Even though it is not clear whether good work well-being actually leads to economic growth, researchers have for decades tried to establish a measureable connection. Such connections are complex and difficult to disentangle. However, studies have shown that mental health problems among workers can lead to productivity losses and high costs for employers². Investing in worksite interventions may lead to financial benefits for employers and workers. Stress, insecurity or an unpleasant social environment between workers can lead to productivity losses and high costs for employers. Investing in work well-being may thus lead to financial benefits for employers and thereby growth.

Furthermore, lack of work well-being is also an indicator of structural problems in a unit, a company or industry. It is not only bad for people, it can also be costly. For example, lack of ensuring work well-being can lead to high employee turnover rates, and thereby increased costs related to recruitment.

So, even if the connection between work well-being and productivity growth has been hard to measure, there are many indications that lack of well-being has a negative impact.

Our analysis shows that even though employees are satisfied with their work well-being and few are experiencing discomfort, many employees highlight problems related to an imbalance between expectations and their ability to fulfil them as well as the general social environment at the workplace as compared to physical issues such as accidents and other health issues. By “social environment” is meant the relations between co-workers as well as between employees and their manager.

The projects' literature studies back the findings that imbalances between requirements and fulfilment may be a problem in growth companies. Companies experiencing rapid growth may encounter problems related to “organisational liquidity”, meaning that workers struggle to stay on track with new tasks generated by increases in turnover, sales, new colleagues or other organisational changes.

An interesting finding, although not a surprise, is that company managers have another view than employees regarding

² See, Court, S., Work and enterprise panel of enquiry: links between the quality of working life and productivity, HSE, London, 2003, Dorman, P., The economics of safety, health, and well-being at work: an overview, InFocus programme on safework, ILO, 2000. <http://www.ilo.org/public/english/protection/safework/econo/index.htm> 'Health and safety at work. A question of costs and benefits', Magazine, Issue 1, European Agency for Safety and Health at Work, Luxembourg, Office for Official Publications of the European Communities, 1999

the work environment. While employees find imbalances between expectations and their ability to fulfil them to be the biggest work environment problem, company managers report sick leave and accidents as the biggest problems. This

result can be seen in the figure below. The findings could indicate a certain mismatch between employees' and management's perception of the work environment.

Figure 8. Percentage of companies experiencing work well-being problems

Source: Survey among companies in the Nordic countries

Question: Has your company within the last 12 months dealt with problems related to the following issues?

Although the analysis uncovers a certain mismatch between the perceptions of managers and employees, there seems to be small differences between growth and non-growth companies when it comes to their perception of the work

environment. There is no special case for a work environment that needs improvements in the growth companies in particular – for instance with regards to stress factors, problems of work-life balance and other relevant issues.

M100 Lu
27.10.2020 08:11
letzte Tech nächste

Lichtmikroskop

195001

4. Case study: Nanotechnology

Nanotechnology³ is exactly what the name implies – a technology. And as a technology it has vast application areas, from ski wax to medicine and to efficient solar cells, to name just a few. Nanotechnology can be the product of a company, such as a nanopowder, or it can be a modification of a small part of a production process which greatly enhances the properties of a key element in a complex product. In the latter case the workers might not be aware of the use of nanotechnology, and the company may not call itself a nanotech-company. Thus it is not straight forward to draw a line between nanotech companies and non-nanotech companies, and in fact nanotech companies cannot be identified by a code in the registers of the central statistical bureaus.

However, in the interviews conducted with nanotech companies, nanotech organisations and authorities dealing with nanotechnology, it became clear that the challenges of the nanotech industry are basically the same as the challenges reported by the rest of the industry. There is a demand for highly skilled personnel, the pro and cons of recruiting internationally are the same, and the problems of financing startups are the same. Although the number of interviewees was far below statistical significance there was even a tendency of the same differences between the Nordic countries as has been reported as overall findings.

In one aspect, however, the nanotechs do single themselves out: a large percentage of nanotech workers have tertiary education, and to a large extent they have PhD degrees. This reflects that these are new technologies that are emerging from universities and research institutes and are finding their ways into new startups and seeping their way into innovation-focussed existing companies. Although we have not been able to confirm this in the statistical analyses, as nanotechs are not identifiable from the registers, it also implies that nanotech may currently have a younger workforce and a more international workforce. The reason for the latter is that a large percentage of PhD students in engineering and natural sciences are of foreign nationality, and there is a tendency that these stay on after their dissertation if they can find work.

When it comes to work well-being, there is an increasing focus on nanotechnology and health which also has implications for occupational health. This is a field with a need for more research on chemical substances, nanoparticles and materials to investigate if they pose threats to humans or to the environment. However, many of the relevant safety precautions are the same as those currently demanded in legislation for hazardous work environments. The issues found in this study for other industries will also be relevant for nanotech companies.

³ Nanotechnology is the study and use of atoms and molecules in the design of materials, components and systems with improved or new properties.

5. Policy recommendations

5.1 Introduction

In our analysis and policy suggestions we have focused on policies regarding the labour market and work well-being. However, there have also been inputs from other areas, namely industrial policy and education and research policy. These policy recommendations are mentioned where they interface with labour and worker well-being policy.

In this chapter we will present the different policy suggestions we have received in the project. Furthermore, we will evaluate and discuss the policy recommendations and prioritize them.

5.2 Methodology

Our study shows that the Nordic countries have initiated and implemented policy that in general must be considered favourable due to a number of factors like a skilled and flexible workforce, efficient administration, low level of regulation and a well-functioning infrastructure. However, all of this may still be improved.

To be able to identify challenges and important framework conditions needing improvements, we have gathered information based on different methods and sources:

- Document analysis and literature reviews.
- Interviews – organisations, companies and policy makers asked for requests and suggestions for policy revisions.
- Survey – companies asked (both employers and employees).
- Register – In the register-based analysis we have mapped the competitive job creators and analysed the drivers of companies' growth.
- Policy Forum – in the Policy Forum we have gathered approximately 25 representatives from policymakers, labour market organisations, researchers, and companies across the Nordics to discuss our findings in the project. On the basis of the analysis, the Policy Forum has discussed the findings and policy recommendations.

In the following we will further evaluate the challenges, the demand for revisions and the policy suggestions gathered in our study.

The connection between the challenges, the demand for policy revisions and the project's recommendations is summarized in tables below in each

chapter. Since some of the challenges have the potential to be addressed at different levels; company, national or Nordic level, we have specified this in the tables as focus areas of each of the policy recommendations. By company level we mean internally in each company, without intervention from authorities.

By national level we mean authorities in the Nordic countries responsible for the policy area in addition to labour market organisations. By Nordic level we mean that the challenge and policy recommendation is suited to be addressed at the Nordic level, such as the Nordic Council of Ministers.

5.3 Labour market policy recommendations

Challenges	Demands for framework revision	Policy recommendations		
		Company focus	National focus	Nordic focus
Ageing of the workforce	Ageing of the workforce and early retirement can be an obstacle to recruitment.*	More flexible working conditions for senior employees. Upgrade qualifications of seniors (and of everyone else).	More flexible pension schemes creating incentives to postpone retirement.	
Globalisation and competitive pressures	Reduce rules and regulations in general. Reduce the restrictions and costs of recruitment of foreign workers in specific.		Reduce administrative burdens, in particular related to international recruitment.	Reduce administrative burdens in connection to the free movement of foreign graduates and labour in the Nordic countries.
Unmatched demand for qualifications	Newly educated must have better “basic” skills. Continuing education at all levels important	Introduction scheme for newly hired.	Internships during education.	

*Companies rate this less important, whereas policymakers see it as an important barrier to future recruitment. This gap between companies’ and policymakers’ perceptions may be explained in part by the relatively low average age of company employees.

5.3.1 Flexible retirement and upgrading seniors' qualifications

Challenges

The ageing of the workforce leads to an obvious challenge to the Nordic countries, as it brings with it potential shortages of labour and hence poses an obstacle to recruitment in the longer run. This, in turn, will affect growth potentials.

Demand for revisions

The topic of ageing of the workforce and the possible shortages of labour in the future was brought up by members of labour market organisations. According to the organisations interviewed, emphasis should be put on retaining elderly employees as a key resource in companies, for example through creating more attention on the benefits of their experience as well as their network and management competences.

Companies, on the other hand, did not view ageing of the workforce as the most important barrier to growth, although it was considered a barrier by growth and non-growth companies alike. This is intriguing, and should probably be seen in the light of the different perspectives of companies, individuals and policymakers. The average age of employees being around 40 years suggests companies will not have to face shortages in labour supply for a number of years to come. This may still, however, pose a large threat to recruitment of staff, as there are indications that labour shortages will affect the labour market in the years ahead. Demographic trends indicate that in the next 10–15 years, the Nordics will experience rapid growth

in the number of people in the labour force at an age that allows them to retire. Meanwhile, the natural increase in the age groups entering the labour force will be significantly smaller than the increase in the cohorts leaving the workforce.

Policy recommendations

Generally speaking, when met with the challenge of labour shortages, the labour force can either be increased, or the productivity of the remaining labour can be increased in order to outweigh the loss of hands due to the decrease in the labour force, the latter of which would involve upgrading and updating of the skills and competences of seniors.

One obvious strategy is to raise the average retirement age. This strategy has been pursued by several western economies, including the Nordic countries, suffering from very similar ageing problems. However, this could be combined with more flexible working conditions for the senior employees with incentives to remain in the labour force, even if this is not at full speed. This must to a wide extent be addressed at company level; as such flexible working conditions would have to be tailored to the individual and to the company in question. Such measures could, however, be backed up by public authorities, for instance by accepting that an employee can receive some degree of salary while receiving old age retirement benefits.

Such an arrangement could, however, also create incentives for some senior employees working at full time at present to work less, because they would then still be able to maintain an acceptable income level in spite of receiving a lower salary. Hence, the gain due to some seniors working part-time

instead of retiring completely must outweigh the loss due to other seniors working part-time instead of postponing retirement all together and continuing to work full-time.

Another strategy is to upgrade and update the qualifications of senior employees. This aspect also mainly needs to be addressed at company level. However, also in this area public authorities and labour market organisations could back up this strategy by ensuring that it is economically attractive to upgrade seniors' qualifications by strengthening incentives in this direction for employees and employers alike.

This strategy's purpose is to counterweigh the loss in the number of hands in the labour market by an increase in the production resulting from each of the remaining hands in the labour market (i.e. raising productivity). It furthermore ensures that skills of motivated elderly people are adjusted and reapplied in other functions. It involves providing continuing education, also for senior employees, which can contribute to the productivity of seniors.

Clearly, this is a balancing act, as education will cost money and time away from work. Furthermore this should be integrated into more life-long learning schemes as a general approach to upgrading and updating the qualifications of the labour force as such (and not just seniors) in order to ensure a more continuous training approach. Upgrading and updating seniors' qualifications may prove an important part of the answer to the shortages in labour supply resulting from an ageing labour force, as seniors may then be able to take on new and more complicated

tasks than before, or move to other work functions, e.g. of a less physical nature.

5.3.2 Reduce administrative burdens related to international recruitment and improve conditions of international students

Challenges

Globalisation forces companies to be more competitive, and in some instances to be more specialised (in order to be more competitive). International recruitment poses an answer to part of these competitive pressures, as specialised competences may be in very limited supply within the Nordics, but more available outside the Nordics.

Demand for revisions

One obvious barrier to growth found to be an obstacle by companies is administrative burdens related to international recruitment. Challenges, administrative burdens related to attracting and recruiting qualified labour from abroad, and regulations restricting the recruitment of foreign workers are seen by the companies as barriers to growth in all Nordic countries.

Also, one area pointed to by the analyses is the recruitment of international students after their graduation. International students are a major asset for several reasons. Firstly, there are shortages of labour in certain industries in the Nordic countries where these students might fit in, once graduated. Secondly, they have knowledge about Nordic culture and language and therefore should have

fewer barriers to entering the labour market, compared to international employees having received their education outside of the Nordics.

Globalisation, in combination with the aforementioned demographic development, necessitates considerations of the need for labour immigration. In addition, the Nordic countries are competing with other countries for skilled labour.

Policy recommendations

The challenges should be addressed at national level by evaluating the policies to increase the recruitment of qualified workers from abroad. More specifically, authorities at national level in the Nordic countries should reduce administrative burdens related to international recruitment. Such administrative burdens could be failure to accredit educational programmes from abroad, complicated tax rules for foreigners and a slow full integration into the tax system and other administrative systems.

This could be elaborated further by the Nordics in cooperation. Even though there is in principle free movement of workers in the Nordic countries, some obstacles remain, for instance with regards to international students. International students are allowed to look for a job for a certain period of time after graduation – but only in the Nordic country in which the student graduated. Therefore, the Nordic countries should increase possibilities for international students to work in all the Nordic countries after graduation. This would help the Nordics in the international competition for talents, since obviously a common Nordic labour market offers

a much wider range of job opportunities than the labour market of one of the Nordic countries only.

Even though labour immigration is probably not a viable strategy to cover the demand for labour alone, it may be one of several strategies pursued by the Nordics.

5.3.3 Introduction schemes and internships

Challenge

Challenges in relation to educating specialists and other personnel in demand aside, the Nordics seem to be educating candidates that are well enough qualified, but who lack basic skills that are needed at the workplace. This means a prolonged period of teaching recently graduated employees how to fit into the workplace and how to carry out the work – a period in which the recently graduated employee is not very productive, and where the production of others may decrease as a result as well.

Demand for revisions

Practical experience is mentioned as an example of skills lacking in university candidates. There appears to be a strong need to increase students' awareness of the qualifications in demand outside of the educational institutions – and to teach them to respond to this demand. Possible measures mentioned to address such issues are increased cooperation between companies and universities and colleges focusing on practical elements. Also, companies stress the need to raise recently graduated employees'

awareness and level of knowledge of the work in a small or medium sized enterprise and in a growth company.

Our study also shows a demand for practical experience and entrepreneurship to be incorporated into the education that students receive.

Policy recommendations

At company level there is a need for policy focusing on upgrading and preparing recently graduated employees. This could be done by introducing more formalised introduction schemes for newly hired employees. The introduction could be for recently graduated candidates and more experienced new

personnel alike. For recently graduated candidates, however, it would have to be a more intensive scheme with colleagues following the recently graduated candidate and showing the person how to carry out work in the organisation in question.

At the national level, it would be recommendable to keep a stronger focus on practical skills and on how to perform in the labour market – in fact at all levels of education. This increased focus could be implemented by introducing or supporting further internships during education. Furthermore policy makers should consider including integration to the labour market as a key element in the financial support for educational institutions.

5.4 Work well-being recommendations

Challenges	Demand for revision		Policy recommendations	
		Company focus	National focus	Nordic focus
Psychosocial well-being	Improve policy framework and regulation of psychosocial well-being.	Prepare and publish KPIs* for work well-being.	Develop a “barometer” for psychosocial working environment. A complete framework that businesses can download from the web.	Coordination of efforts in uncovering knowledge and initiatives. Best practice sharing.
Family life and work-life balance	Flexible working-hours necessitate flexible welfare support mechanisms.		Flexible opening hours in kindergartens.	
Complex regulatory environment	The current regulations as a meaningful tool in several situations, but regulation is overall too complex.		Cost-benefit analysis showing the added value of work well-being rules and regulations.	

* KPI= Key Performance Indicators

5.4.1 Work well-being KPIs and psychosocial work environment "barometer"

Challenge

From our study of the state of the work well-being in the Nordic countries, a major finding is that employees in growth companies see it as the most important work environment challenge to reach the optimal balance between expectations and their ability to fulfil them. Such challenges could lead to a less well-functioning psychosocial work environment.

Demand for revisions

Rules and regulations in the Nordic countries have traditionally focused on worker safety and physical work well-being, while psychosocial well-being has been left out for obvious reasons: it is less tangible, and interacts with individual characteristics in a much more complex manner than does physical work well-being. Companies and organisations alike, however, pointed out a need to develop the psychosocial work well-being policy framework and regulation, provide companies with more guidance, and make available information on how to deal with psychosocial work environment problems.

Policy recommendations

It is an important question whether it is possible to manage psychosocial work well-being issues by making changes to laws and regulations. Even though there are some differences in the

regulatory regimes between the Nordic countries, in the matter of psychosocial work conditions they all consider them as important and to be monitored as closely as physical work conditions.

In Norway, all companies are obliged to adopt a systematic approach to their work environment, which includes the psychosocial environment. In Denmark, the situation is much similar to Norway. In 2011, agreement was reached to focus on the psychosocial work environment efforts, and the Danish parliament very recently passed a new Work Environment Act, which puts equal weight on the psychosocial and the physical work environment. In Finland, mental well-being at work and managing work demands and mastering work have been chosen as areas of focus. In Sweden, there is systematic work to achieve a human friendly environment, meaning expectations and demands at work are adjusted to reasonable limits in relation to the capacities of human beings.

A strategy to improve the psychosocial work environment could be to develop relevant incentive structures to promote a well-functioning work environment. This could be done for instance by developing and publishing key performance indicators (KPIs) for work well-being. It should be a common framework with different sets of KPIs which companies could download for internal use. By developing KPIs for work well-being, companies could evaluate their own performance over time and implement measures if the KPIs indicate that there is a need for them. This can all be done at the company level, and could be an important parameter in the competition

among companies for employees. Some agent may have to act as a catalyst, especially in beginning. This might be the labour market organisations, but could also be authorities.

Furthermore, the authorities could create dashboards or “barometers” of the psychosocial work environment in the countries. These could be posted on webpages, making it easy for companies to benchmark work well-being with companies in similar industries and/or with people with similar educations or functions.⁴ The barometer should be administered by national labour inspection authorities, and these authorities could be responsible for developing a fixed framework for companies to download and use for internal use.

At company level, managers and supervisors could be supplied with knowledge and better means to manage possible imbalances experienced by employees and with knowledge to develop their skills in positive feed-back and the creation of a safe psychosocial environment. Employees’ job engagement can be supported by managers who establish work conditions where job resources (like autonomy, performance feed-back, social support) match job demands (like work pressure, intensity, emotional demands).

At the level of public service, advisors and councillors could be supplied with knowledge and means to help managers deal with employees who struggle with

psychological or stress-related problems.

One important aspect to make clear is that there may be a tendency to overindividualise problems related to the psychosocial work environment; a tendency which may not be well supported by empirical evidence. There are longitudinal studies showing that psychosocial imbalances increase the risk of several health-related problems, irrespective of individual differences.⁵

We also suggest that there should be Nordic initiatives, coordination of efforts, and cooperation on topics related to psychosocial work well-being. There is currently a much stronger focus on the psychosocial work environment in the Nordic countries than in the past. In the Nordic countries, there are a lot of local, regional, or national instruments and measures related to work well-being. However, a much more coordinated effort with development of methods to improve the psychosocial work environment and to carry out evaluations of initiatives would be an advantage. The Nordic level could support development of such coordinated effort in this area, where a lot of knowledge still needs to be uncovered, and where political focus is being directed.

Spreading best practices of initiatives to improve the psychosocial working environment could also be part of a Nordic commitment, and there is a continuous need to let knowledge of best practices flow among actors across the borders.

⁴ One example of this is the barometer developed by the Norwegian Institute of Occupational Health, showing exposure and health outcomes related to indicators for psychosocial, organizational, physical, mechanical, chemical and biological exposures in the work environment.

⁵ Amble, Nina; Enehaug, Heidi; Forseth, Ulla; Gjerberg, Elisabeth; Grimsmo, Asbjørn; Hauge, Torild I., Winther, Fredrik. 2003. Arbeidsmiljø og mestring hos frontlinjearbeidere i flytransporttjenesten. Oslo: Arbeidsforskningsinstituttet. Rapport 6. Enehaug, Heidi og Gamperiene, Mingle 2011. Nærtransportsjåførenes arbeid. Oslo: Arbeidsforskningsinstituttet. Rapport 2. Schafft, Angelika; Spjelkavik, Øystein; Brøgger, Benedicte; Grimsmo, Asbjørn. 2012. Arbeidsgiverløs – lederstøtte i arbeidet med psykiske helse på arbeidsplassen. Oslo: Arbeidsforskningsinstituttet. Rapport 16. Lau, Bjørn 2012. Arbeid, helse og engasjement blant ansatte i Den norske kirke. Oslo: Arbeidsforskningsinstituttet. Rapport 17.

5.4.2 Introduce flexible kindergartens

Challenge

More flexible working hours in most sectors of industry and trade do not correspond well with traditional “welfare infrastructure” support functions. More specifically, the typical Nordic dual earner family structure combined with the increasingly more flexible work schedules of many growth companies are challenged by inflexible opening hours, many closing days per year etc. of kindergartens and other public support functions, forcing working parents to struggle for time consuming or expensive alternative solutions to the detriment of their ability to focus on their work.

Demand for revisions

Day care and kindergarten opening hours are pointed to by employees and employers as important sources of imbalances between what is expected by the workplace and the employees’ ability to fulfil these requirements.

Therefore there is a desire for more flexible kindergarten opening hours.

Policy recommendations

In most of the Nordic countries, there is an established and well-functioning kindergarten policy. Nevertheless, the impression from our study implies that there can be room for improving the current regulations by making kindergartens more flexible for the parents.

We therefore suggest that the Nordic countries introduce more flexible opening hours in kindergartens

and look further into how this can be implemented in order to meet the changes we observe in the labour market. Policymakers also have to evaluate how these trends will impact the kindergartens and the community there, including the children’s well-being and the work environment of kindergarten personnel.

5.4.3 Cost-benefit analyses of work environment regulations

Challenge

The current regulation of worker well-being is perceived as a meaningful tool in several situations, but regulation is overall too complex.

Demand for revisions

An issue mentioned by both the survey respondents and interviewees is the need for both simplification and evaluation of the rules and regulations regarding work well-being as well as the administration of these rules. For instance, Danish companies experience that filling out work well-being plans and strategies is cumbersome and resource demanding.

Companies mention that control and laws need to be flexible and adaptable to the individual company. Overall there seems to be a need for sustained focus on keeping the regulation and reporting schemes as lean as possible.

It is necessary to bear in mind that rules and regulations have been introduced in order to solve or avoid specific problems. However, the authorities need to find solutions that are in compliance with the task of easier administration in this area as well.

Policy recommendations

One way of evaluating different work well-being measures and policies could be to conduct assessments of the costs and benefits of the measures. This could be done in different ways, for instance by conducting a cost-benefit analysis evaluating who incurs the costs and who enjoys the benefits. Another method could be to choose certain examples or business cases, where measures to improve work well-being have been implemented with success, and which are suitable to share as a best practice example to inspire other companies. These initiatives should be conducted by national policymakers.

Furthermore, there could be more practical measures in order to look at

the administrative burdens. E.g. the Danish government has launched a forum for companies which has suggested 40 specific laws and regulations that are burdensome. A panel like this could be launched in the work well-being policy area in order to adopt knowledge on the daily challenges for companies. Furthermore, the Danish tax authorities have recently completed a lead user project on how to look at the Danish tax regulation from a company perspective and found several radical measures that are in compliance with the purpose of the law but still reduce the burdens and difficulties for companies. Similar projects could be conducted within work well-being regulation and administration.

Sammenfatning

De nordiske velfærdsstater står over for nye udfordringer i en stadig mere globaliseret verden. Den øgede konkurrence understreger behovet for, at de nordiske lande styrker konkurrenceevnen og støtter op om vækst og jobskabelse.

Denne rapport er udarbejdet som en del af projektet "Økonomiske vækstområder" under Nordisk Ministerråd. Formålet med projektet er at udarbejde ny viden om, hvordan de nordiske lande kan støtte op om, og få fordele af, nye vækstområder, gennem en forbedring af rammebetingelserne på arbejdsmarkeds-, uddannelses-, forsknings- og erhvervsområdet. Projektet sigter desuden på at skabe vidensudveksling mellem de nordiske lande. Herudover dækker projektet feltet for nanoteknologi som en særlig case. De overordnede mål med projektet er at udvikle anbefalinger til tiltag, der kan styrke betingelserne for vækst og jobskabelse i de nordiske lande. Der ses derfor på, hvordan rammebetingelserne kan optimeres, så de nordiske lande kan styrke vækstområderne, som i sidste ende bidrager til velfærdsstaterne i Norden.

Analysen er udarbejdet af et konsortium af eksperter fra nordiske videns- og forskningsinstitutioner, ledet af DAMVAD. Projektet er to-årigt og hviler på solid metodologisk grund, herunder registerbaserede analyser,

spørgeskemaundersøgelser og kvalitative interviews. Fem arbejdsrapporter, en covernote og denne endelige rapport kan downloades fra www.damvad.com/nordic-growth.

Partnerne i projektet er: DAMVAD, Oslo Economics, Jari Kuusisto og Martin Meyer (University of Vaasa, SC-Research), Arbeidsforskningsinstituttet (AFI), Gunnel Hensing (prof., Göteborg Universitet), Per Kongs-høj Madsen (prof., Aalborg Universitet) og SINTEF (The Foundation for Scientific and Industrial Research at the Norwegian Institute of Technology).

Definitioner

Rapporten opererer med de følgende to centrale definitioner:

Konkurrencedygtige jobskabere

De konkurrencedygtige jobskabere er fundet gennem den statistiske registerbaserede analyse udført i forbindelse med projektet (see appendixpapiret til arbejdsrapport 2 for mere information).

De er identificeret ved brug af to overordnede kriterier. For det første skal virksomhederne have genereret øget beskæftigelse i perioden fra 1999-2008. For det andet er kun virksomheder blandt de 25% mest produktive i deres

branche valgt. Se working paper 2: "The competitive job creators" for en mere detaljeret beskrivelse.

Vækstvirksomheder

Det er ikke gennem spørgeskemaundersøgelserne muligt præcist at identificere de konkurrencedygtige jobskabere, eftersom de er defineret meget detaljeret i den registerbaserede del af undersøgelsen, som beskrevet ovenfor. "Vækstvirksomheder" er derfor anvendt, når resultaterne fra spørgeskemaundersøgelserne og de kvalitative interviews beskrives, og fungerer som en approksimation for de konkurrencedygtige jobskabere.

Vækstvirksomhederne er fundet gennem spørgeskemaundersøgelserne blandt virksomheder i de nordiske lande og segmenteret efter sektor, størrelse og geografi, baseret på den registerbaserede analyse. Dette er gjort for at kunne målrette spørgeskemaundersøgelserne efter områder, hvor der er størst koncentration af vækstvirksomheder. Virksomheder, som har oplevet vækst i antallet af medarbejdere i deres respektive lande gennem de seneste tre år, er her defineret som vækstvirksomheder. Derudover er de interviewede virksomheder alle udvalgt på baggrund af den vækst de har skabt.

Sammenfatning af analysen

Projektet har overordnet haft fokus på at besvare de følgende spørgsmål:

- Hvem er de nordiske vækstvirksomheder?

- Hvad karakteriserer vækstvirksomhedernes behov for arbejdskraft?
- Hvilke rammebetingelser sikrer et match mellem udbuddet og efterspørgslen efter arbejdskraft for vækstvirksomhederne?

For at kunne besvare disse spørgsmål er der udarbejdet en række analyser baseret på forskellige metodiske elementer. Analysen kombinerer således indsigt fra interviews med virksomheder, arbejdsmarkedsparter og andre organisationer samt politiske beslutningstagere fra hvert af de fem nordiske lande, med spørgeskemaundersøgelser blandt vækstvirksomheder og medarbejdere i vækstvirksomheder. Endelig er der udført en registerbaseret analyse af de konkurrencedygtige jobskabere. Analyserne og resultaterne heraf er dokumenteret i fem arbejdspapirer, udarbejdet i forbindelse med projektet. I det følgende opsummeres resultaterne af disse fem papirer. Arbejdspapirerne, en covernote og denne rapport kan downloades fra www.damvad.com/nordic-growth.

Working Paper 1: Framework conditions for high-growth industries in the Nordic countries. Dette arbejdspapir gennemgår litteraturen for de eksisterende rammebetingelser for arbejdsmarkedspolitik, arbejdsmiljøpolitik, uddannelsespolitik og erhvervspolitik. Papiret identificerer en række "megatrends" inden for arbejdsmarkedspolitik, som de konkurrencedygtige jobskabere skal forholde sig til. Blandt disse er den aldrende arbejdsstyrke,

arbejdsstyrkens øgede multietniske karakter, den stigende andel af kvindelige medarbejdere med en høj uddannelse, globaliseringen, et aftagende behov for at medarbejdere skal være fysisk til stede på deres arbejdsplads og endelig en polarisering af arbejdsstyrken mht. kvalifikationer. Disse megatrends – især globalisering, den aldrende arbejdsstyrke og den stigende andel af kvindelige medarbejdere med en høj uddannelse – leder til vigtige ændringer i rammebetingelserne for de konkurrencedygtige jobskabere.

Analysen, der fokuserer på arbejdsmiljøet blandt vækstvirksomheder ses ikke ofte i litteraturen, hvilket gør denne analyse nyskabende, og den eksisterende litteratur er gennemgået i dette lys. En vigtig overordnet faktor for arbejdsmiljøet på moderne nordiske arbejdspladser er psykosociale ubalancer og det faktum, at en familie som oftest består af to arbejdende voksne medlemmer. Dette leder ofte til store udfordringer med at kombinere arbejde og familieliv. Her er bl.a. lange arbejdstider og usikre jobvilkår vigtige faktorer, der kan skabe ubalance.

Ser man nærmere på uddannelsespolitik og erhvervspolitik, findes store forskelle på tværs af de nordiske lande. For det første ser Norge ud til at være forløber, når det kommer til at undervise i entreprenørskab på universiteter m.v. For det andet ses det, at de nordiske lande har udviklet meget forskellige strategier, for at imødekomme udfordringen med et manglende match mellem udbud og efterspørgsel på kvalifikationer. Finland har her lagt den mest radikale strategi, hvor behovet for forskellige typer af kandidater

fremskrives på meget formel vis. For det tredje har alle landene et stærkt fokus på vækst og konkurrenceevne, men Danmark ser ud til at være forløber, når der ses på opstartsvenlige miljøer for iværksættere.

Working Paper 2: Competitive job creation. I dette arbejdsrapport identificeres de brancher og sektorer, hvor der er vækst i de nordiske lande, og der præsenteres desuden en analyse af faktorer som leder til vækst. Analysen bygger på registerbaseret mikrodata fra de nordiske statistikbureauer.

De konkurrencedygtige jobskabere findes i mange forskellige brancher – heriblandt brancher i samlet vækst, men også brancher som samlet set oplever tilbagegang. En vigtig observation er, at der er en række brancher, på tværs af de nordiske lande, som oplever stærk vækst, mens andre brancher oplever en større grad af polarisering.

Derudover finder working paper 2, at uddannelse (sekundær og tertiær), materielle anlægsaktiver samt eksport er faktorer, der leder til øget produktivitet. Ydermere viser papiret, at en øget andel af de ansatte, som er højtuddannede, er en mere effektiv måde at forøge produktiviteten i en virksomhed, som i forvejen er højproduktiv, end det er i mindre produktive virksomheder. Derimod ses det modsatte, når der fokuseres på materielle anlægsaktiver, der har en tendens til at forøge produktiviteten mere i mindre produktive virksomheder frem for blandt de højproduktive virksomheder. Derfor bør virksomheder, der ønsker at forøge produktiviteten, fokusere på investeringer i materielle anlægsaktiver først, og veluddannede ansatte i anden omgang, se figur 9 og 10.

Figur 9. Forholdet mellem anlægsaktiver og produktivitet, (kvantilregression). Svenske virksomheder rangordnet efter deres produktivitet

Kilde: Egne beregninger baseret på registerdata fra de nordiske statistiske centralbureauer.

Note: Graferne viser styrken af sammenhængen mellem anlægsaktiver og produktivitet inden for procentfraktiler af produktivitsfordelingen af virksomheder (X-aksen).

Figur 10. Forholdet mellem tertiær uddannelse og produktivitet (kvantilregression). Danske virksomheder rangordnet efter deres produktivitet

Kilde: Egne beregninger baseret på registerdata fra de nordiske statistiske centralbureauer.

Note: Graferne viser styrken af sammenhængen mellem andelen af personalet med tertiær uddannelse (videregående uddannelse) og produktivitet inden for procentfraktiler af produktivitsfordelingen af virksomheder (X-aksen). De prikkede linjer ved siden af grafen viser 95% konfidensintervallet.

Resultaterne peger imidlertid ikke lige så klart på sammenhængen mellem de ovenstående faktorer og beskæftigelsesvækst, jf. figur 11 og 12. Tertiær (og ikke sekundær i samme grad) uddannelse og eksport er vigtige faktorer for beskæftigelsesvækst. Det samme er immaterielle anlægsaktiver, men kun for virksomheder, der i forvejen

er i et vækstforløb. For virksomheder, der vokster langsomt, er materielle og immaterielle anlægsaktiver i mindre grad forbundet med beskæftigelsesvækst. Yderligere viser analysen, at tertiær uddannelse i mindre grad hænger sammen med beskæftigelsesvækst for de virksomheder, som ikke vokster, end for virksomheder der vokster meget.

Figur 11. Forholdet mellem den initiale andel af tertiært uddannede og beskæftigelsesvækst over en fire-årig periode (kvantilregression). Svenske virksomheder rangordnet efter deres beskæftigelsesvækst

Source: Egne beregninger baseret på registerdata fra de nordiske statistiske centralbureauer.

Note: Graferne viser styrken af sammenhængen mellem andelen af personalet med tertiær uddannelse (videregående uddannelse) og beskæftigelsesvækst inden for procentfraktiler af fordelingen af virksomheder rangordnet efter deres beskæftigelsesvækst (X-aksen). De prikkede linjer ved siden af grafen viser 95% konfidensintervallet.

Figur 12. Forholdet mellem initiale anlægsaktiver og beskæftigelsesvækst over en fire-årig periode (kvantilregression). Norske virksomheder rangordnet efter deres beskæftigelsesvækst

Kilde: Egne beregninger baseret på registerdata fra de nordiske statistiske centralbureauer.

Note: Graferne viser styrken af sammenhængen mellem anlægsaktiver og beskæftigelsesvækst inden for procentfraktiler af fordelingen af virksomheder rangordnet efter beskæftigelsesvækst (X-aksen). De prikkede linjer ved siden af grafen viser 95% konfidensintervallet.

Working Paper 3: Demand and supply of labour in the competitive job creators. Dette arbejdsrapport anvender spørgeskemaer og kvalitative interviews med virksomhedsledere, samt interviews med relevante arbejdsmarkedsparter og politiske beslutningstagere. Papiret viser, at vækstvirksomhederne allerede delvist agerer efter konklusionerne i arbejdsrapport 2. Disse virksomheder ansætter nemlig højtuddannede medarbejdere i højere grad end andre virksomheder.

Vækstvirksomhederne finder det vanskeligt at finde medarbejdere med de rette kompetencer. I alle de nordiske lande har vækstvirksomhederne i spørgeskemaundersøgelserne vanskeligere ved at finde medarbejdere

med de rette kompetencer, end ikke-vækstvirksomheder har. Det kan være en trussel mod vækstvirksomhedernes potentiale for mere vækst.

Derudover kan det observeres, at vækstvirksomhederne i ansættelsessituationen rangerer sociale færdigheder højere end tekniske eller metodologiske færdigheder. Det kan forklare ved, at de interviewede vækstvirksomheder understreger, at uddannelse og kompetencer opfattes som en forudsætning for, at en kandidat kan være attraktiv, og at det udgør "billetten" til jobsamtalen, hvor sociale færdigheder, og det "at være den rette person", er vigtigst.

Politiske beslutningstagere og vækstvirksomhederne er ikke enige

når det kommer til udfordringen med den aldrende arbejdsstyrke. Hvor de politiske beslutningstagere og arbejdsmarkedsparterne forudsiger at den aldrende arbejdsstyrke bliver en stor udfordring for det fremtidige udbud af arbejdskraft, mener vækstvirksomhederne ikke at det er en vigtig faktor. Det kan skyldes, at de konkurrencedygtige jobskabere identificeret gennem analysen har medarbejdere med en gennemsnitsalder på omkring 40 år, således at disse ikke kommer til at opleve udfordringer med ældre medarbejdere i den nærmeste fremtid. Derudover forventes den aldrende befolkning først at få en effekt på længere sigt, og ikke i den nærmeste fremtid. Politiske beslutningstagere og arbejdsmarkedets parter har ligeledes ofte et længere tidsperspektiv end virksomheder, hvilket derfor også kan være en del af forklaringen på at vækstvirksomheder ikke ser den aldrende befolkning som en udfordring.

En måde hvorpå vækstvirksomhedernes udfordringer med at finde de rette medarbejdere kan afhjælpes er ved at hyre udenlandske medarbejdere. Dog udgør de nordiske sprog og – særligt – den nordiske kultur to vigtige barrierer for vækstvirksomhederne i deres søgen efter medarbejdere. Derudover anvender små og mellemstore virksomheder i mindre grad denne form for rekruttering, eftersom det kræver større investeringer i tid og andre ressourcer.

Working Paper 4: Work well-being in growth companies. Dette arbejdspapir fokuserer på arbejdsmiljøet blandt virksomheder i de nordiske lande, og særligt på hvordan det kan forbedres og hvordan det kan have en indvirkning

på virksomheders vækst. Papiret er baseret på spørgeskemaundersøgelser blandt virksomheder og medarbejdere samt på interviews med politiske beslutningstagere, arbejdsmarkedsparter og virksomhedsledere.

Konklusionerne fra litteraturgennemgangen i Working Paper 1 mht. arbejdsmiljø i det første arbejdspapir bekræftes af det fjerde arbejdspapirs analyser, og resultaterne heraf. Således er det psykosociale arbejdsmiljø og ubalancer i forbindelse hermed identificeret som værende vigtige arbejdsmiljøemner.

Virksomheder og medarbejdere vurderer dog i de gennemførte spørgeskemaundersøgelser arbejdsmiljøet til at være af høj kvalitet, og kun få oplever utilfredsstillende forhold. Dette bekræfter tidligere studier, som finder, at nordiske medarbejdere vurderer deres arbejdsmiljø positivt.

Resultaterne viser ikke store forskelle mellem vækst- og ikke-vækstvirksomheder. Der er således ikke fundet evidens for, at der er et særligt behov specielt i vækstvirksomhederne for at justere eller forbedre arbejdsmiljøet, eksempelvis i forhold til faktorer der skaber ubalance, "work-life balance"-udfordringer, etc.

Working Paper 5: Demand for revision of framework conditions. Arbejdspapir 5 er som arbejdspapir 3 og 4 baseret på interviews med politiske beslutningstagere og virksomhedsledere, såvel som spørgeskemaundersøgelser blandt vækstvirksomheder og medarbejdere. Papiret søger at identificere den specifikke efterspørgsel efter justeringer og ændringer i rammebetingelser, fra virksomheder, arbejdsmarkedets parter eller fra de politiske beslutningstagere.

Inden for arbejdsmarkedspolitik peges især på høje lønninger, som værende den største forhindring for vækst blandt virksomhederne i spørgeskemaundersøgelserne. Derudover nævnes ligeledes administrative byrder i.f.m. sygeorlov og ydelser at spille en vigtig rolle i alle landene. Begrænsninger på rekrutteringen af udenlandsk arbejdskraft nævnes ligeledes som en væsentlig barriere.

Herudover nævnes beskyttelse af medarbejdere i forbindelse med opsigelser som en af de vigtigste barrierer blandt de interviewede virksomheder, mens dette dog i mindre grad vurderes som værende en vigtig barriere i spørgeskemaundersøgelserne. Regulering af skifteholdsarbejde og arbejdstimer blev nævnt som værende problematiske faktorer i interviewene med virksomhederne og arbejdsmarkedets parter. Reguleringen opfattes her som værende gammeldags og ude af trit med behovet i en moderne vækstvirksomhed. Denne observation er vigtig, idet mindre regulering kan betyde øget stress i forbindelse med arbejdsmiljø.

Den overordnede regulering af arbejdsmiljøet ser ud til at være vel-fungerende, og opfattes ikke som en større barriere for vækst. Virksomhederne angiver, at de finder de administrative byrder i forbindelse med reguleringen af arbejdsmiljø som en byrde, men de opfatter ikke, at regelsættet som sådan er en barriere. Denne observation er vigtig, idet arbejdsmiljø og tiltag til forbedringer heraf kan ses som barrierer for vækst for vækstvirksomheder, eftersom det kan øge de administrative omkostninger for vækstvirksomhederne. Derimod kan

et godt arbejdsmiljø være en kilde til vækst, men reguleringen i forbindelse hermed kan være en udfordring for vækstvirksomhederne. Derfor kan det være en mulighed at tænke i mere innovative og mindre administrativt tunge måder, at definere krav på. Med hensyn til uddannelsespolitik mener virksomhederne ikke at det eksisterende system skaber det rette udbud af kandidater, som har de rette kompetencer til at kunne begå sig i en lille eller mellemstor vækstvirksomhed. Dette stemmer overens med observationen ovenfor, vedr. virksomhedernes udfordringer med at finde medarbejdere med de rette kompetencer.

Konklusionerne og observationerne fra projektet kan kortfattet op-summeres til det følgende:

- De konkurrencedygtige jobskabere findes såvel i brancher, som ikke er i fremgang, som i brancher der samlet set er i fremgang. De findes ligeledes blandt såvel industrivirksomheder som servicevirksomheder.
- Tertiær uddannelse, immaterielle anlægsaktiver og eksport er vigtige faktorer for beskæftigelsesvækst for virksomheder. De konkurrencedygtige jobskabere agerer efter dette, og ansætter veluddannede medarbejdere, selvom de ifølge spørgeskemaundersøgelsen i ansættelsessituationen rangerer sociale kompetencer højere end mere formel uddannelse, i form af f.eks. tekniske færdigheder. De foretagne interviews viser dog, at den formelle uddannelse først og fremmest betragtes som en forudsætning for

at blive kandidat til et job, mens de sociale færdigheder, frem for akademiske færdigheder, er vigtige i den faktiske interviewsituation.

- Arbejdsmiljøet blandt de konkurrencedygtige jobskabere er på det samme niveau som for andre virksomheder, og vurderes som værende godt.
- Den aldrende arbejdsstyrke, globalisering og et manglende match mellem efterspørgslen efter, og udbuddet af, kvalifikationer, er blandt de vigtigste udfordringer for vækst i de konkurrencedygtige jobskabere. De politiske beslutningstagere og vækstvirksomhederne er dog uenige vedrørende den aldrende arbejdsstyrke. Hvor de politiske beslutningstagere og arbejdsmarkedets parter anser aldringen for en stor barriere for fremtidig rekruttering af medarbejdere, anser vækstvirksomhederne ikke dette for en vigtig barriere.
- Vækstvirksomhederne nævner dog også lønniveauet, beskyttelse af medarbejdere i forbindelse med opsigelse samt de overordnede administrative byrder i forbindelse med regulering, som vigtige barrierer for vækst.
- Psykosociale ubalancer, work-life balance og et komplekst regulatorisk rammeværk ses som de største udfordringer for at sikre et velfungerende arbejdsmiljø blandt vækstvirksomhederne. Arbejdsmiljøet blandt

vækstvirksomheder er generelt på samme niveau som arbejdsmiljøet i andre virksomheder, og vurderes som værende godt.

Anbefalinger

Anbefalingerne er baseret på projektets resultater og input fra diskussioner heraf i et nordisk Policy Forum med deltagelse af arbejdsmarkedets parter, virksomhedsledere, politiske beslutningstagere, forskere o.a.

De nordiske lande har, overordnet set, velfungerende rammebetingelser. Analyserne i forbindelse med dette projekt viser dog, at der er potentiale for yderligere at forbedre disse rammevilkår, med det formål at forøge konkurrenceevnen og støtte op om vækst og jobskabelse.

Analyserne peger på muligheder for at foretage justeringer inden for to områder: arbejdsmarkedspolitik og arbejdsmiljøpolitik. Anbefalingerne er nærmere beskrevet i kapitel 5 i denne rapport. Parenteserne efter de enkelte afsnit nedenfor henviser til det relevante afsnit i dette kapitel.

Arbejdsmarkedspolitik

- Det anbefales, at der særligt fokuseres på at begrænse manglen på arbejdskraft i fremtiden pga. den aldrende arbejdsstyrke. Der bør her sættes fokus på handling og samarbejde mellem virksomheder og den offentlige sektor, med det formål at udvikle strategier for at øge incitamenterne for at blive længere på arbejdsmarkedet. (5.3.1)

- Derudover anbefales det, at der fra politisk side fokuseres på at mindske de administrative byrder for virksomhederne i forbindelse med international rekruttering, og på at forbedre mulighederne for internationale studerendes overgang til arbejdsmarkedene i hele Norden, og ikke blot det nordiske land de har læst i. (5.3.2)
- Analyserne viser, at der er et manglende match mellem efterspørgslen efter kvalifikationer og udbuddet af arbejdskraft, særligt hvad angår de nyuddannede. Det foreslås derfor, at der sættes fokus på at forbedre de nyuddannedes muligheder for at komme ind på arbejdsmarkedet. (5.3.3)

Arbejdsmiljøpolitik

I forhold til arbejdsmiljøpolitikken kan det observeres, at der er et behov for justeringer på det psykosociale område.

- Det foreslås i den forbindelse, at virksomhederne systematisk indsamler og offentliggør data for "key performance indicators" for det

psykosociale arbejdsmiljø, som på sigt kan anvendes til at udarbejde nationale arbejdsmiljø-"barometre." Derudover foreslås det, at der på nordisk plan fokuseres på at indsamle best-practice eksempler på metoder og måder hvorpå virksomheder har håndteret og forbedret det psykosociale arbejdsmiljø. Derudover foreslås det, at der igangsættes tværnordiske initiativer vedr. det psykosociale arbejdsmiljø, og at der sker en klarere koordinering af indsatsen og samarbejdet om emner relateret til det psykosociale arbejdsmiljø. (5.4.1)

- Ydermere foreslås det, at der fokuseres på at skabe retningslinjer, metoder eller faktorer, som kan hjælpe medarbejdere med at balancere mellem familie og arbejdslivet, herunder kan f.eks. fleksibel arbejdstid og fleksible åbningstider i børnehaver overvejes. (5.4.2)
- Det anbefales endvidere at den komplekse regulering på arbejdsmiljøområdet analyseres gennem en cost-benefit analyse, for at illustrere værdien af regler og regulering på arbejdsmiljøområdet. (5.4.3)

Nordic Growth Sectors – How can working life policies contribute to improving the framework conditions?

The Nordic welfare states are facing new challenges in an increasingly globalised world. Fiercer competition has underlined the need for the Nordics to enhance competitiveness – and to support and nurse growth in industry and businesses.

This report presents the key findings and policy recommendations of the project “Nordic Growth Sectors.” Having identified growth companies in the Nordics, the project analyses growth drivers, the match between supply and demand of labour, the work environment in the companies, and growth and other companies’ perceptions of existing framework conditions and improvement needs.

Based on the analyses and on a Nordic Policy Forum held in Copenhagen with participation of policymakers from the central administrations, labour market organisations, universities and growth companies, a set of policy recommendations are developed, the most important of which are to

- Introduce more flexible retirement schemes
- Deminish international recruitment red tape
- Prepare graduates better for employment
- Create national work environment “barometers”
- Introduce more flexible child care facilities
- Carry out cost-benefit analysis of complex regulation