



**GLOBAL ALLIANCE**  
FOR HEALTHY WORKPLACES

# 3<sup>rd</sup> Roundtable of Global Alliance for Healthy Workplaces

Ex-Monastero di Sant'Agostino  
Università degli Studi di Bergamo

September 6, 2018



# Summary

On September 6th 2018, the **Global Alliance for Healthy Workplaces** hosted the 3<sup>rd</sup> roundtable meeting. This partnership between the Global Centre for Healthy Workplaces and FIESC/SESI brings together leading international stakeholders in the field of workplace health, safety and wellbeing in order to craft a global strategic plan and more effective actions leading to healthy workplaces and the promotion of worker health worldwide.

## Hosts

### *Global Centre for Healthy Workplaces*

The Global Centre for Healthy Workplaces (GCHW) supports the advancement of workplace health and well-being. Through a series of initiatives designed to enhance shared learning, recognition and replication, the Global Centre seeks to create a healthier and more productive working experience for all employers and employees, irrespective of their size, location or circumstances. <https://www.globalhealthyworkplace.org>

### *FIESC/SESI*

FIESC/SESI is the main body representing the industries of the state of Santa Catarina with Headquarters in the city of Florianopolis. The FIESC System consists of the following: Social Service of Industry (SESI), National Industrial Apprenticeship Service (SENAI) and Euvaldo Lodi Institute (IEL).



# Vision of the Global Healthy Workplace Alliance

The Global Healthy Workplace Alliance will lead a consultation process among leading stakeholders in the field of workplace **health, safety and wellbeing** in order to craft a global strategic plan and more effective actions leading to healthy workplaces and the promotion of worker health worldwide.

## Goals of the Roundtable:

- To facilitate information sharing and networking among key stakeholders in the field of workplace **health, safety and wellbeing**;
- To create a shared vision for the Global Alliance;
- To build consensus and alignment for a joint global platform among the roundtable participants.

# Opening

Dr. Mara Azzi, General Director of ATS Bergamo, welcomed the Roundtable participants to Bergamo and the ex-Monastero. Tommy Hutchinson and Wolf Kirsten, Co-Directors of the Global Centre for Healthy Workplaces, subsequently opened the Roundtable by asking participants to introduce themselves (*see attached list of participating organizations*).

Wolf Kirsten provided an overview of the Global Alliance vision and goals as well as a recap of the past two Roundtables in Washington, DC and Singapore. The Global Alliance brings together global leaders in the field from multiple disciplines and sectors such as academia, government, private sector, as well as non-governmental organizations (NGOs) to facilitate a consultation process and create a shared vision for the field of workplace health.



# Progress Report on the Alliance for Health and Competitiveness in Santa Catarina (Brazil)

SESI SC serves 300,000 workers every day via 272 physical units and 24 mobile units as well as one innovation center for better health and safety. The Alliance for Health and Competitiveness was created in 2016 as a strategic decision to establish safe and healthy workplaces for human development by engaging leaders of various sectors. Next to the mobilization of key stakeholders' goals are the sharing of knowledge and creation of solutions. The Alliance focuses on the following four main areas:

1. Knowledge development on the link between health & safety and business performance;
2. Awareness building among industrial leaders and workers about the importance and benefits of investments in health and safety in the work environment;
3. Mobilization of the partners to implement integrated actions;
4. FIESC, SESI and SENAI will offer solutions for the development and management of safe and secure work environments and behavior, to promote holistic health (physical, emotional and social).

The Alliance has offered 16 workshops across the state attracting more than 600 participants (politicians, union representatives, government agencies, companies, health providers etc.). Key topics included changes in regulations for safety of machines and equipment, the changing nature of work and automation, taking care of the aging workforce and making leaders more aware of their roles in these issues. So far, emphasis has been placed on raising awareness of the benefits, providing technical support and offering activities. A new web platform was launched which has integrated health and safety through a risk perspective. In addition, the "Guidoo" app was created, which offers personalized advice and team-based challenges linked with social media in the areas of exercise, nutrition and leisure activities.

SMEs remain a challenge as many are resistant to investing in the health of employees, but are a key target as they represent the bulk of all enterprises. A partnership with the Inter-American Development Bank to boost health promotion among SMEs is currently being implemented.

# Progress report on “Healthy Investments” Project: *Investors’ Perception of Workplace Health & Wellbeing Study*

Successful investors require intricate knowledge of the underlying performance of a company. Workplace health and wellbeing is an important indicator in determining productivity and overall business performance. The relationship between good practices in workplace health and financial performance has been documented in numerous studies as outlined in the Global Centre’s *Discussion Paper on Investors’ Perceptions of Workplace Well-being* <http://www.globalhealthyworkplace.org/documents/Healthy-Investments.pdf>

The paper concluded the following:

**A. The relationship between good practices in workplace health, safety and wellbeing and financial performance**

A number of recent studies demonstrated that publicly traded companies with either award-winning health promotion programs or with high health and wellness index scores significantly outperform the tracked stock market index over a certain time frame.

**B. Global drivers for health, safety and well-being programs (with regional variations);**

A growing number of employers are recognizing the value of integrating occupational health and safety, human resources and health services for enhanced programming, communications and analytics. *For examples see “Healthy Workplaces: A Selection of Global Good Practices”*

<http://www.globalhealthyworkplace.org/documents/Healthy-Workplaces-Good-Practices.pdf>

**C. Inclusion of health, safety and wellbeing criteria in investment portfolios (examples of existing ESG funds and related reports).**

An increasing number of investors are incorporating environment, social and governance (ESG) factors into their analysis criteria, not only for dedicated ESG funds, but also for an abundance of other funds. Health and safety falls under the social area in which employees are featured.

## Progress report on “Healthy Investments” Project: *Investors’ Perception of Workplace Health & Wellbeing Study Continued...*

In 2018 the Global Centre consulted a global group of experts to generate healthy workplace criteria and metrics for inclusion in investment analysis. The draft index is currently being introduced to select investors and financial analysts for review and feedback. For an accurate assessment to be made on the underlying factors which drive business performance, company data needs to go beyond merely publishing statistics on occupational injuries and fatalities. Comprehensive assessment requires (but is not limited to):

- a systematic health, safety and wellbeing process which includes a needs assessment and program evaluation
- the addressing of risks in the physical and psychosocial work environment
- measurable employee outcomes in areas such as health risks, engagement, turnover, sickness and presenteeism.

Indicators or metrics should be standardised as best possible and comparable within sectors. *See attached Healthy Investments update statement on page 18.*

Bettina Reinboth from the United Nations-supported Principles for Responsible Investment (UNPRI) introduced the 6 Principles of Responsible Investing. UNPRI *“believes that an economically efficient, sustainable global financial system is a necessity for long-term value creation. Such a system will reward long-term, responsible investment and benefit the environment and society as a whole. The PRI will work to achieve this sustainable global financial system by encouraging adoption of the Principles and collaboration on their implementation; by fostering good governance, integrity and accountability; and by addressing obstacles to a sustainable financial system that lie within market practices, structures and regulation.”*

# Progress report on “Healthy Investments” Project: *Investors’ Perception of Workplace Health & Wellbeing Study Continued...*

The six principles of responsible investing are:

1. We will incorporate ESG (environment, social, governance) issues into investment analysis and decision-making processes.
2. We will be active owners and incorporate ESG issues into our ownership policies and practices.
3. We will seek appropriate disclosure on ESG issues by the entities in which we invest.
4. We will promote acceptance and implementation of the Principles within the investment industry.
5. We will work together to enhance our effectiveness in implementing the Principles.
6. We will each report on our activities and progress towards implementing the Principles.

<https://www.unpri.org/pri/what-are-the-principles-for-responsible-investment>

After launching in 2006 the PRI now has more than 2000 signatories in form of asset owners, investment managers and service providers. A growing number of financial analysts are integrating ESG considerations into valuation and shareholders are actively engaging to incorporate ESG. PRI is providing a collaboration platform for investors to share information, enhance legitimacy, avoid duplication and increase resources and influence. PRI has also produced a number of guidance documents, e.g.:

- ESG integration: how are social issues influencing investment decisions
- Labor standards in the apparel industry

<https://www.unpri.org/investor-tools/guidance-and-case-studies-for-esg-integration-equities-and-fixed-income/3622.article>

UNPRI and the Global Centre recently produced a podcast on “How investors can promote health and well-being in the workplace”:

<http://pripodcasts.libsyn.com/how-investors-can-promote-health-and-well-being-in-the-workplace>

# Discussion of Healthy Investments Project

The following points were made during the discussion:

## Motivation of Investors

- These interesting discussions are opening up new frontiers of action. Our world is moving, we need to create communities where everyone wins and has shared values. The Asia Pacific Economic Cooperation (APEC) meeting in Papua New Guinea could be a platform meeting. How do we connect with them to amplify the message?
- The new **World Bank Human Capital Index** will be used to rank countries. Unless you have human capital, you will not be able to compete, the index will be aligned to investment grading of countries. <https://www.worldbank.org/en/news/immersive-story/2018/08/03/investing-in-people-to-build-human-capital>
- A link to the Sustainable Development Goals (SDGs) should be made.
- The investor community is showing they are interested in this. There is a UN meeting in November. An Australian group have disinvested in tobacco companies, large pension funds are reviewing.
- Sponsors can force changes (i.e. driving sports)
- How do we tactically formulate a campaign? Investors don't know the answer

## Data collection

- Health must be seen as a value and an indicator.
- There must be some coherence, development of common language and understandings.
- This needs to be looked at as an opportunity not only a risk. This is for the long term, so room to explore.
- There are very different reporting structures across the world, a challenge to compare and benchmark.
- To make progress there needs to be some sound measurement system and standardisation to provide guidance, possibly using USA standards as nothing really in EU suitable.
- SAP uses a health culture index: a 1% increase of perceived health, could save the company € millions.
- The OECD Better Life index looks at wellbeing. Last year the OECD released *Guidelines on Measuring the Quality of the Working Environment*. These could be applied to surveys to be harmonious.

<http://www.oecdbetterlifeindex.org/#/111111111111>

<http://www.oecd.org/statistics/job-quality.htm>

## Country Examples:

### New Zealand

- The NZ Treasury has developed the **NZ Living Standards Framework** where they are looking at human, social, physical and financial and environmental capitals.
- There has been a consultation period with much research done looking at international data, inclusive of the SDG's and the OECD Better Life Index (this they found the most useful).
- They are going to need to adapt this to make sure there are Māori and other cultural considerations.
- The 2019 Budget is going to be based on wellbeing, using this framework.
- They also looked at OECD Job Quality for possible introduction at later date. It was noted that they recognised it would be hard to collect data and other groups identified that they should be looking at psychosocial risk data as part of health and safety compliance. <https://treasury.govt.nz/information-and-services/nz-economy/living-standards>

### United Kingdom (UK)

- The **Good Work** Commission looked at job quality as well as the social and economic impacts.
- The Better Work Index, included health and wellbeing, using a simplified index, is going to trial with SMEs.
- 'Good Work' is good for business. Investors need to look at a lot of research from HR, OECD (*G20 of human capital*).
- The real challenge is to get the investment community to invest, there are not enough pressure points. How can we do this if we don't have a proper understanding? Where does the health and wellbeing data sit? It is harder for them to see a healthy workforce as an asset. Need to understand what weight is given.
- The culture of health needs to be seen as intrinsically good and we need a language for CEO's, investors etc.
- Don't underestimate power of the financial sector. Leverage off the private sector. There is an appetite there, we need to leverage off what others have done and build on these.

# Discussion of Healthy Investments Project Continued..

## Key Takeaways and Next Steps for Healthy Investments Project

- Communicate with a clear focus: impact on health outcomes; good health is good business; what is good for the worker is good for the enterprise.
- Support the process of the standardisation of data, e.g. with OECD (job quality guidelines).
- Explore an investor forum with the International Financial Corporation (IFC) brokered by the World.
- Learn from what is happening in sustainability and environmental fields.
- Link with communities of different organisations, to find commonalities with high level advocacy, partnership activities and regional activities with a common agenda to discuss the topic, work collaboratively to move forward, e.g. with World Bank Human Capital Project.



# Healthy SMEs 2020 Project

Dietmar Elsler of the European Agency for Safety and Health at Work in Bilbao provided an overview of how to motivate small and medium-sized enterprises (SMEs) to invest in Healthy Workplaces. It is important to collect the knowledge and good practice, inclusive of case studies, especially regarding micro employers with less than 10 employees as these make up a good portion of workplaces. The cost of work-related accidents and diseases amounts to 3.9% of GDP globally and 3.3% of GDP in the EU28. In the UK the employer carries 19% of the cost burden. Therefore, a significant economic incentive exists. A strong business case can be made at the enterprise level, e.g. a 2.2 return can be generated per €1 spent on occupational safety and health (OSH). The economic benefits of workplace health promotion and prevention were summarized by IGA in 2009 specifying a cost-benefit ratio of 2.3-5.9%.



Guidance is available at:

<https://osha.europa.eu/en/themes/safety-and-health-micro-and-small-enterprises>

# Healthy SMEs 2020 Project Continued...

Pilots with campaign partners have shown effective results in various industries. It is vital to focus on proactive measures such as training, education and protection rather than on incidents. While it is possible to improve OSH in micro and small enterprises (MSEs) there is a need for solutions which are effective in reaching out to the most vulnerable MSEs. Focus needs to be on governance, regulation and enforcement, social partners, advisory services and education and practical support.

## Discussion

Leading on from the presentation the following key points were made:

- It is important to look at safety and health together, they are inter-related. The Ministry of Manpower in **Singapore** identified that 30% of fatalities were due to underlying health conditions. Collaborative work with a pilot has \$10m to promote safety and health together.
- Singapore has been active in supporting SMEs with regard to creating healthy workplaces: access to a manual of health programs, subsidies, contracted service providers conduct the activities for the SMEs;
- Singapore has hard-to-reach professional workers, e.g. designers, IT workers, free lancers, taxi drivers, gig economy workers, who often work from home and need to be catered for;
- In some European countries SMEs benefit from local networks where they share and learn about health promotion strategies and resources (what works, what doesn't), e.g. in **Germany** these are organized by health insurances, which have a legal mandate to offer workplace health promotion;
- Another promising model for getting SMEs on board was presented in form of a **cluster-based approach** in which larger corporations share their expertise and resources with smaller enterprises, e.g. guidelines and tutorials for education on health practices;
- The role of corporations in influencing supply chains should be addressed (e.g. how far down do they need go);

# Healthy SMEs 2020 Project Continued...

- Culture is very important to health and wellbeing and is directly impacted by the leadership so needs a focus.
- There needs to be addition to the value proposition, with a focus on risk factors and the SME duty of care.
- SMEs require differing approaches: targeted individual, industry based and possibly incentives to attend training, insurance etc.
- In the **UK** SMEs now have better access to Occupational Health and they are targeting sector-based groups. This is inclusive of subsidized access, free government return to work (RTW) programs and a focus on musculoskeletal and mental health.
- SMEs need consistent support in many areas inclusive of: face to face consulting; management training (to showcase health as a value) financial advisors and specific tailored website portals.
- We cannot underestimate the power of regulation and free market economics. There is a strong argument about the need to have a balanced role of the government.
- **Case studies** should be shared following these steps:
  - a) Identify the common features and circulate a template.
  - b) Identify one's that what we've missed, then publish.
  - c) Document with a regulatory and non-regulatory lens.
  - d) A regulatory index needs to be developed for public and policy makers.

## Next Steps for Healthy SMEs 2020

It was agreed upon to compile a selection of good practices regarding the advancement of health in SMEs. Many good country examples were described, which have not been summarized and featured on a global scale. This type of information would benefit SMEs as well as organizations tasked with improving the health of employees in SMEs. Enterprises would be able to access benchmark data from different countries and sectors in order to compare and compete with other like-minded enterprises. This would lead to tailored learning and enhanced exchange between SMEs.

# Conclusion & Next Steps

The Global Alliance Roundtable concluded with a commitment to continue to pursue the two discussed projects:

1. Healthy Investments
2. Healthy SMEs 2020

The Global Centre will drive and manage the projects in partnership with SESI SC.

Other topics of interest expressed were:

- The role of **artificial intelligence** in the advancement of workplace wellbeing as well as **technology** in a broader sense
- Developing a comprehensive and effective approach to **mental wellbeing** at the workplace.

Furthermore, the Roundtable expressed support for a **high-level global campaign** involving the WHO, ILO, OECD and World Bank and highlighting the role of healthy workplaces in human capital development.

With regard to the communication and governance of the Global Alliance participants highly recommended a regular interaction and exchange via email or another media platform.

The Global Alliance will continue to advance cross-sectoral and public-private partnerships by broadening the Alliance and inviting new participants to the next Roundtable. The next Global Alliance Roundtable will be held on the occasion of the 7th Global Healthy Workplace Summit in September of 2019.

# Appendices: Participating Organisations

Organization	Country	Name
ABQV/IAWHP	Brazil	Alberto Ogata
American University	USA	Bob Karch
ATS	Italy	Roberto Moretti
ATS	Italy	Marinella Valotti
ENWHP	Germany	Karl Kuhn
EU OSHA	Spain	Dietmar Elsler
FZ Safety & Health Centre	Ghana	Edith Clarke
University West	Sweden	Jan Winroth
Global Centre for Healthy Workplaces	USA/Germany	Wolf Kirsten
Global Centre for Healthy Workplaces	UK	Tommy Hutchinson
Griffith University	Australia	Cordia Chu
Health Improvement Solutions	USA	Joe Leutzinger
Health Promotion Board	Singapore	BK Sim
INSHT	Spain	Maria Dolores Sole
Institute of Employment Studies	UK	Stephen Bevan
National Institute of Public Health	Finland	Antero Heloma
OECD	France	Fabrice Murtin
Optum	Ireland	Peter Ross
SESI SC	Brazil	Marco Goetten
University of Perugia	Italy	Giuseppe Masanotti
UNPRI	UK	Bettina Reinboth
Healthy Workplace Specialist	New Zealand	Janice Riegen
WHO	Switzerland	Faten Ben Abdelaziz
World Bank	USA	Patricio Marquez

# Appendices: Agenda

- 9:00** Welcome & Introductions  
ATS, SESI SC and Global Centre for Healthy Workplaces
- 9:30** Progress report on the Alliance for Health and Competitiveness in Santa Catarina, Marco Goetten, SESI SC
- 10:00** Progress report on the Healthy Investments Project: the Investor Perspective  
+ presentation on “The 6 Principles of Responsible Investing”, Bettina Reinboth, UNPRI (*10mins*)
- 10:45** Break
- 11:15** Discussion on Investor Study
- 11:45** Progress report on SME Project from Global Expert Group  
+ presentation on “Motivating small and medium-sized enterprises (SMEs) to invest in Healthy Workplaces”, Dietmar Elsler, European Agency for Safety and Health at Work (*10mins*)
- 12:45** Future Activities
- 13:00** Close

# Healthy Investments | Good Health = Good Business

Successful investors require intricate knowledge of the underlying performance of a company. Workplace health and wellbeing is an important indicator in determining productivity and overall business performance. The relationship between good practices in workplace health and financial performance has been documented in numerous studies

<https://www.globalhealthyworkplace.org/research-and-publications/>

A growing number of investors and financial analysts understand the importance of workplace health and wellbeing. The environmental, social and governance (ESG) criteria highlight the relationship between the health and safety of employees and business performance. Susana Peñarrubia, Senior Portfolio Manager at **DWS**, sees *“health and wellbeing as one of the most important social indicators for measuring company business performance”*.

A large body of evidence has demonstrated the positive outcomes of health and wellbeing programs. However, many investors are unsure what constitutes a good program and what type of indicators to look for. The Global Centre for Healthy Workplaces (GCHW) has collected data on good practice programming for over six years via its Global Awards and Certification program and developed a **Healthy Workplace Index** for investment analysis.

Companies with successful programs report on their health and wellbeing strategy and outcomes to all stakeholders. For example, Global Awards winner **Unilever** provides information on their Well-Being framework and health protection as well as on the business impact of their programs. Its aggregated results illustrate that for every €1 Unilever spends on Lamplighter programmes produces a return of €2.44. The Global Healthy Workplace Award for Multinational Enterprises winner 2017, **Chevron**, *“recognizes that healthy employees are better able to do their jobs and that health and well-being impact safe operations.”*

# Healthy Investments | Good Health = Good Business Continued...

The Global Centre for Healthy Workplaces believes that for an accurate assessment to be made on the underlying factors which drive business performance, company data needs to go beyond merely publishing statistics on occupational injuries and fatalities.

Comprehensive assessment requires (but is not limited to):

- a systematic health and wellbeing process which includes a needs assessment and program evaluation
- the addressing of risks in the physical and psychosocial work environment
- measurable employee outcomes in areas such as health risks, engagement, turnover, sickness and presenteeism

Indicators or metrics should be standardised as best possible and comparable within sectors.

*Investors need to know if their companies have a credible healthy workplace program – does yours?*

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The initial Discussion Paper on “Investors’ Perceptions of Workplace Wellbeing” is available at <https://www.globalhealthyworkplace.org/documents/Healthy-Investments.pdf>.

For updates on the Global Centre for Healthy Workplaces *Healthy Investments* program visit [www.globalhealthyworkplace.org](http://www.globalhealthyworkplace.org).

To participate in the *Healthy Investments* program, contact [info@globalhealthyworkplace.org](mailto:info@globalhealthyworkplace.org).

# Contact

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