



Nav's Horizon Scan 2025–2035

Societal trends toward 2035 and
consequences for the Norwegian Labour
and Welfare Administration (Nav)



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Summary



Why does Nav need a Horizon Scan?

#1

Basis for accurate strategies and priorities

#2

Reflection on and discussion of how societal trends will impact us

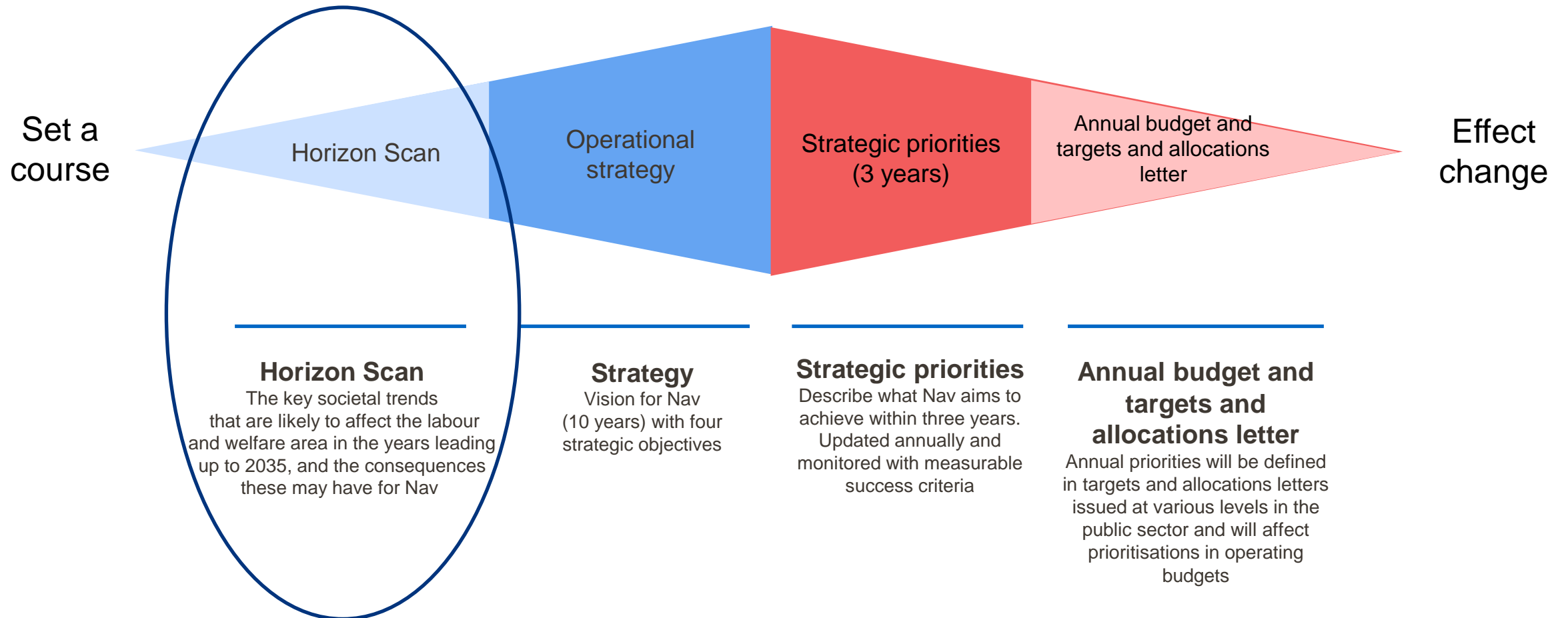


Society is changing rapidly and in unpredictable ways. This Horizon Scan assesses which trends are most important for Nav and which are the most uncertain.



Nav employees are the primary target audience, but we also want to reach decision-makers and partners.

From vision of the future to effecting change



Main changes from the last Horizon Scan

- Increased **global insecurity**
 - Tense security situation and turbulence in global trade
 - Democracies are under pressure, and we are also seeing changes in attitudes and values in Norway
- **Artificial intelligence** is maturing as a technology
 - Clearer applications in the labour market and for Nav, but new threats are also emerging
- **Clearer gap** between user expectations for in-person and digital meetings and services
- More **vulnerable user groups** and tight municipal finances increase pressure on social services



Photo: Microsoft stock
images


New tools and presentation forms


- New, interactive **demographics tool** provides better insight into local population developments
- Six **scenarios** highlight positive and negative outcomes for uncertainties related to exclusion, user expectations and technology
- **Predictions** for how economic development and the outcome of the trade conflicts may affect social services and the labour market
- Nav's employees have been asked **both** which trends may be important **and** which seem most uncertain leading up to 2035





Photo: Microsoft stock images

Societal trends and Nav toward 2035

- Labour shortages, strong increase in demand for assistive technology and pensions
 - Increased demand for efficient and targeted services
 - Sustainable welfare policy
- 

- Geopolitical uncertainty and protectionism – must be prepared for abrupt changes in migration and labour market
 - Stronger focus on security and preparedness
- 

- Artificial intelligence plays central role in labour market and service development
 - Skills gap – unskilled workers most vulnerable
 - Better balance between digital services and personal assistance
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- Better health should lead to less demand for health benefits, but restructuring and mental health issues may increase it
 - Developments in immigration/integration is a main factor in social services
- 

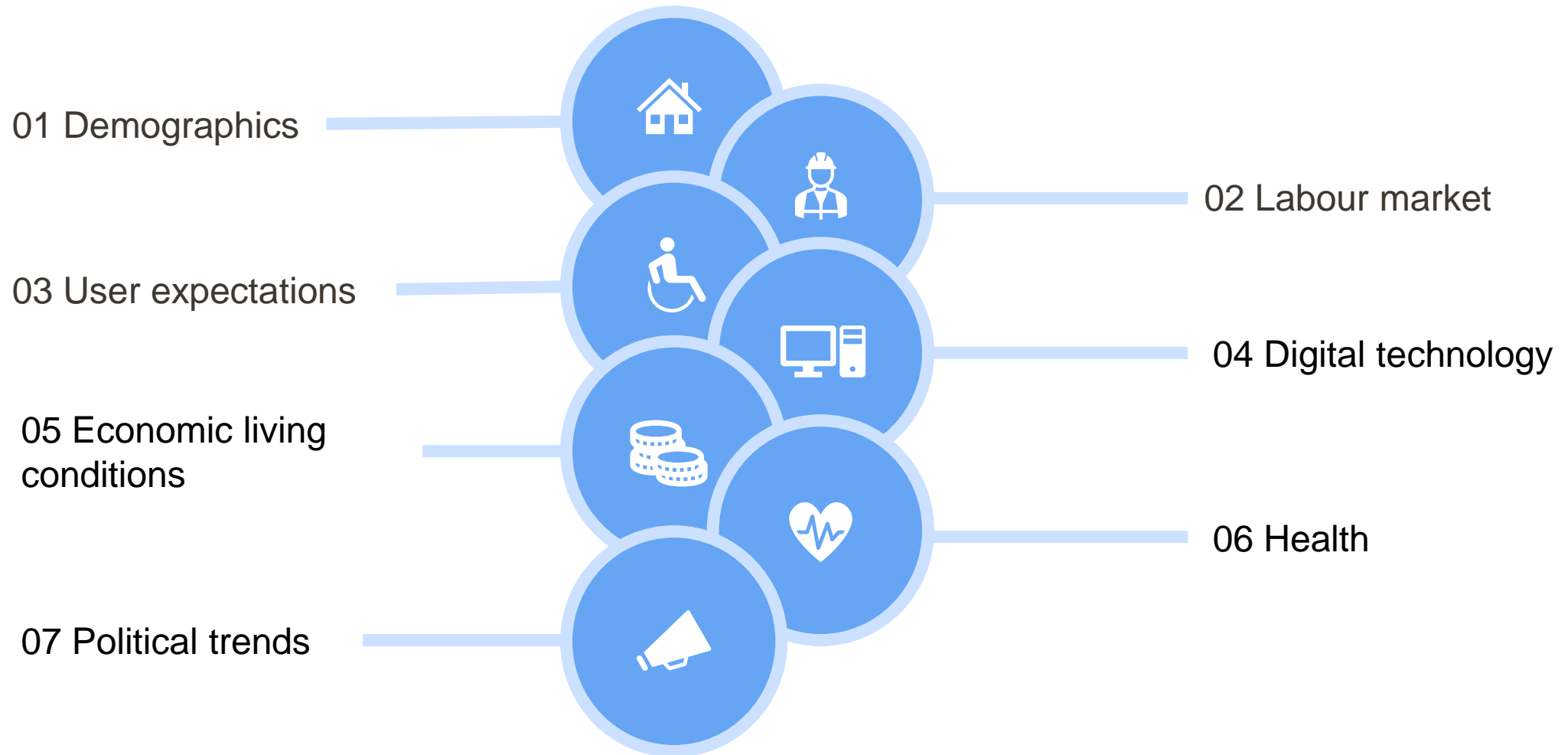
Central uncertainties for Nav

- Global situation: War/conflict, trade barriers, tougher prioritisations
- Consequences of artificial intelligence on the labour market and Nav
- Level and composition of immigration
- Development in mental health problems/disorders and consequences for exclusion



Photo: Unsplash

7 societal areas



Scenarios



Inclusion and living conditions

Employment important for living conditions

High employment and good integration lead to good living conditions, and fewer children and youths will experience poor living conditions in childhood

Nav, the health care and education sectors, municipalities and employers contribute by working together on integration

We offer targeted education, lifelong learning and individual follow-up

We could fail if

- Tight public budgets and limited capacity become barriers
- Regional unemployment and low mobility lead to poor living conditions, mistrust and polarisation

User meetings

Users prefer digital solutions

Most prefer digital services and AI-supported tools

Clear prioritisation between standard solutions and personal assistance

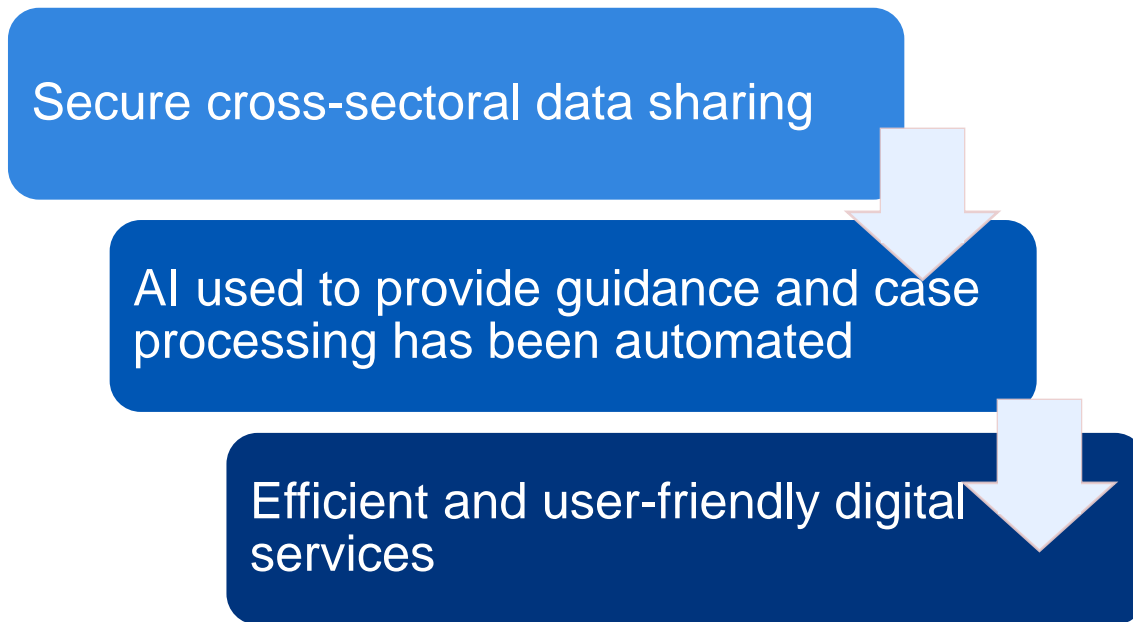
Fewer Nav offices, but more expertise

We could fail if

- High expectations and lack of prioritisation between user groups
- Ineffective services and long wait times
- Increased exclusion and growth of private services

Nav in the digital age

The public sector is leading



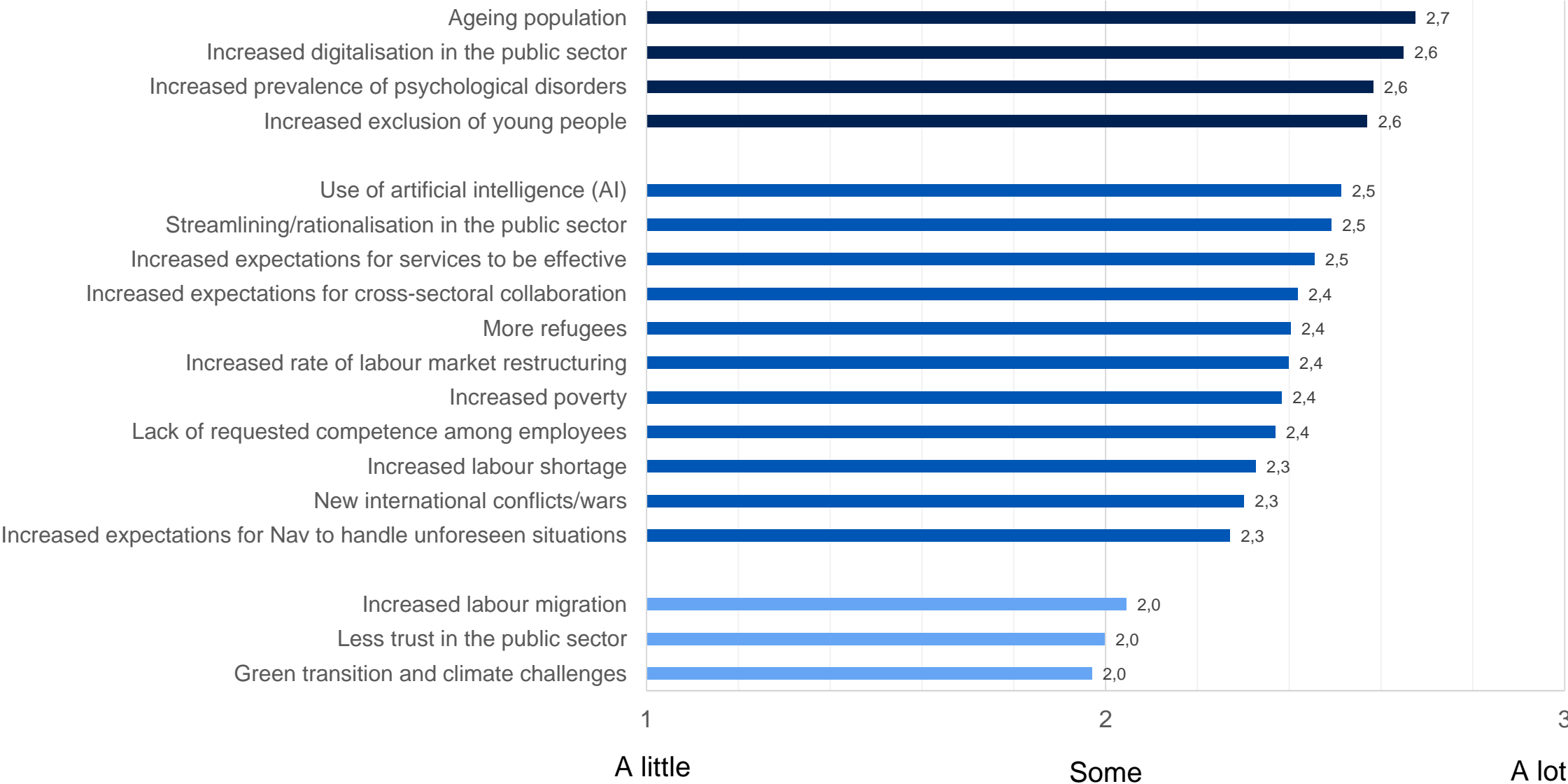
! We could fail if

- Lack of ICT expertise and digitisation-friendly regulations and funding
- Outdated systems in parallel with new services leads to limitations in data sharing and high administrative costs
- Low satisfaction and mistrust in the population

Employee perspectives



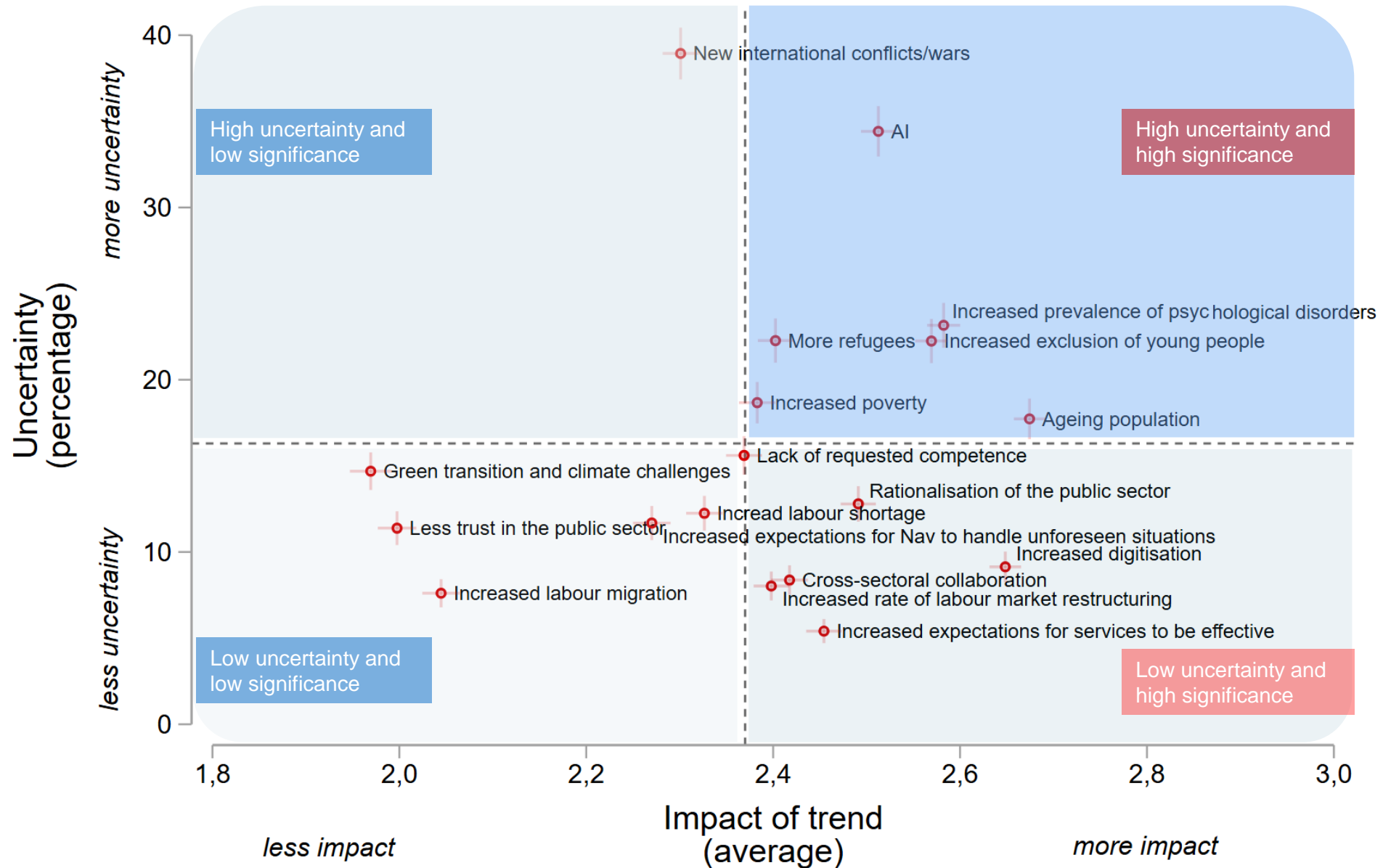
Societal trends likely to affect Nav in the next 10 years, according to Nav employees



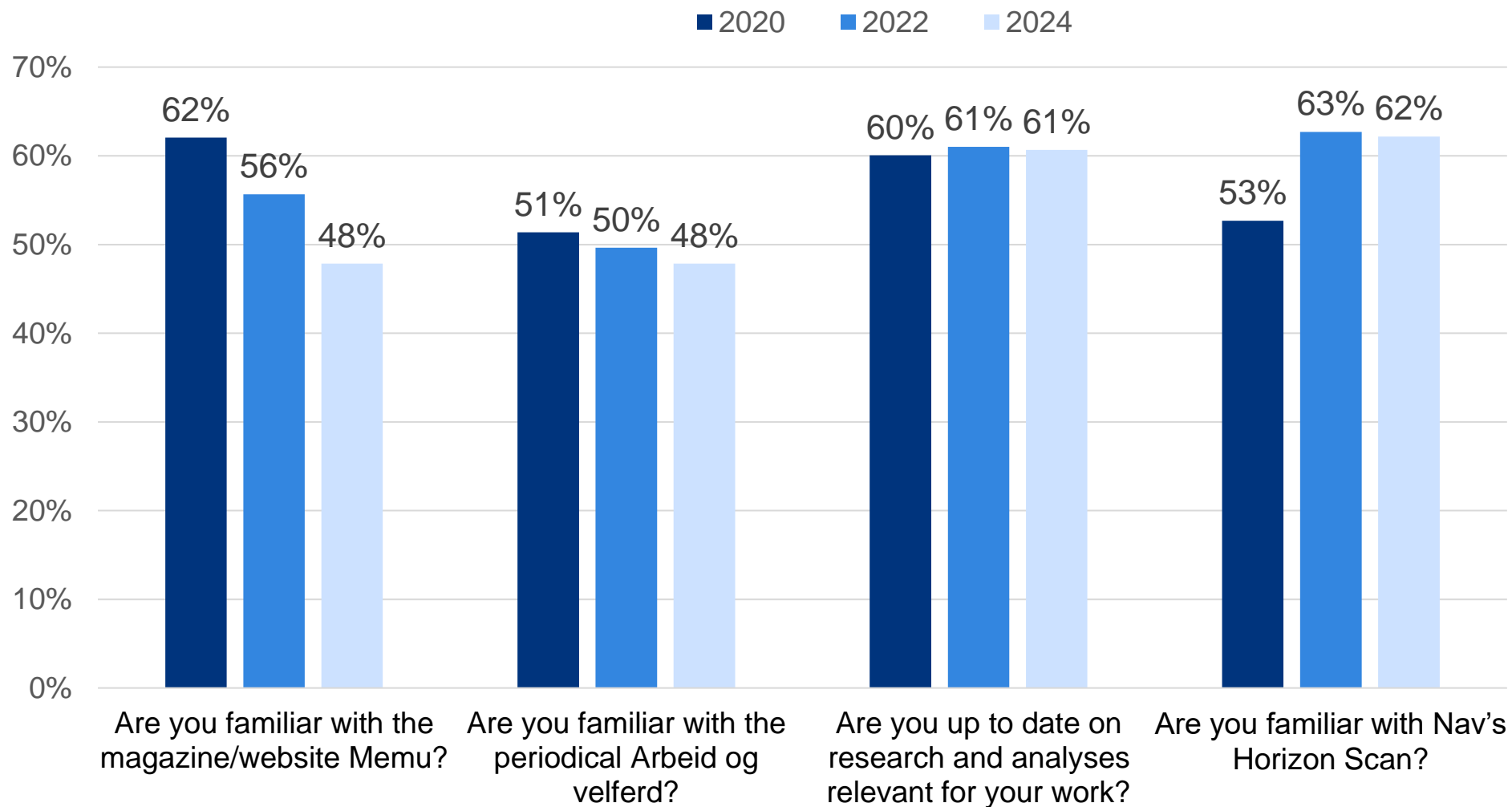
How uncertain do Nav employees believe these trends are?



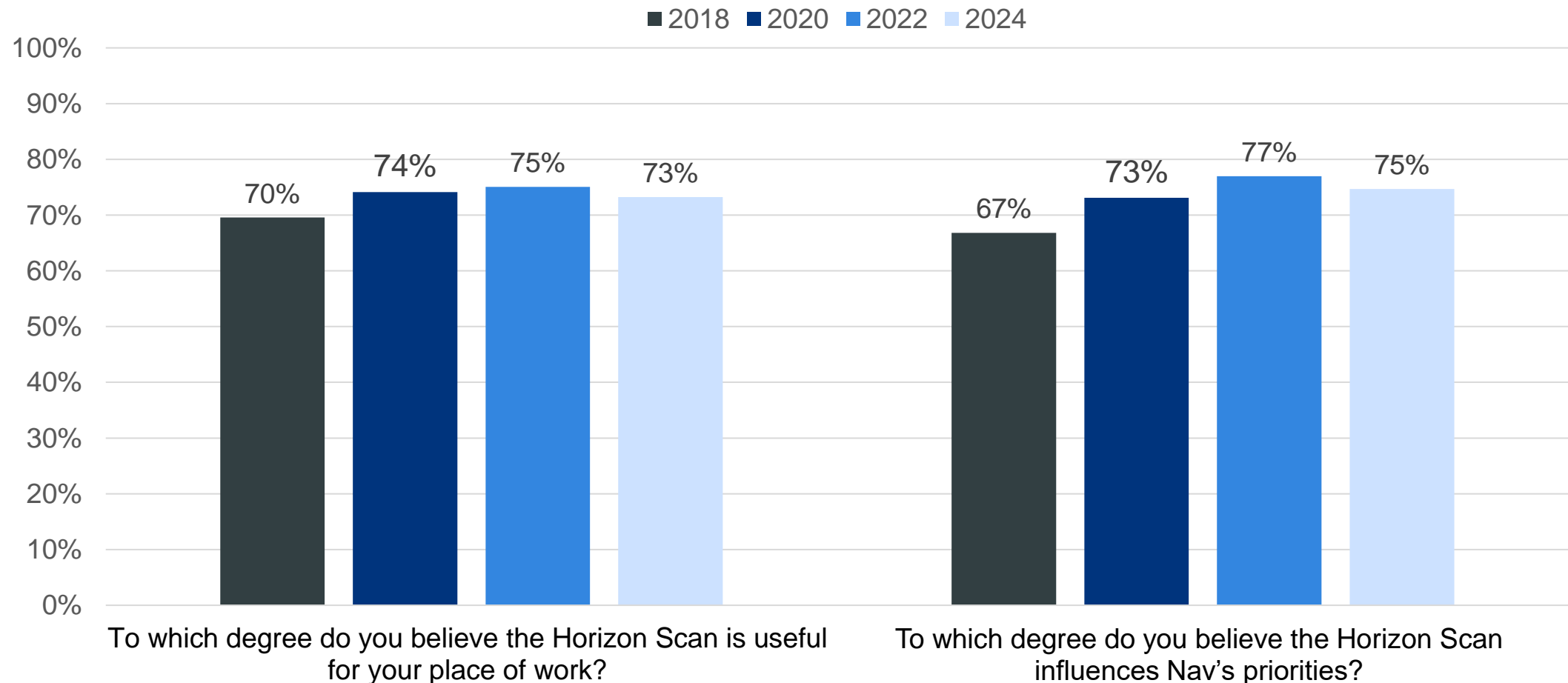
Which societal trends have both high uncertainty and high significance for Nav?



Familiarity with Horizon Scan and other knowledge sources within Nav



Employees believe the Horizon Scan both is useful and has the ability to influence Nav's priorities

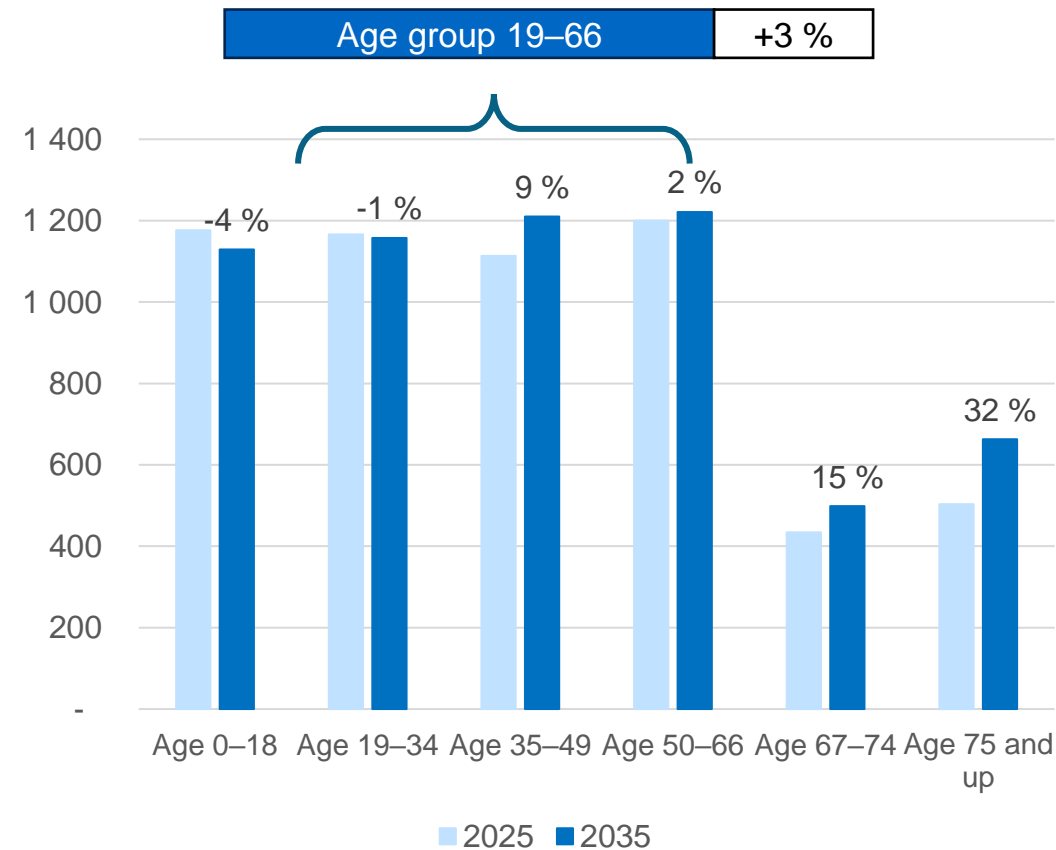


Demographics



Population, 2025 and 2035

Figures in 1,000 and changes in percentages



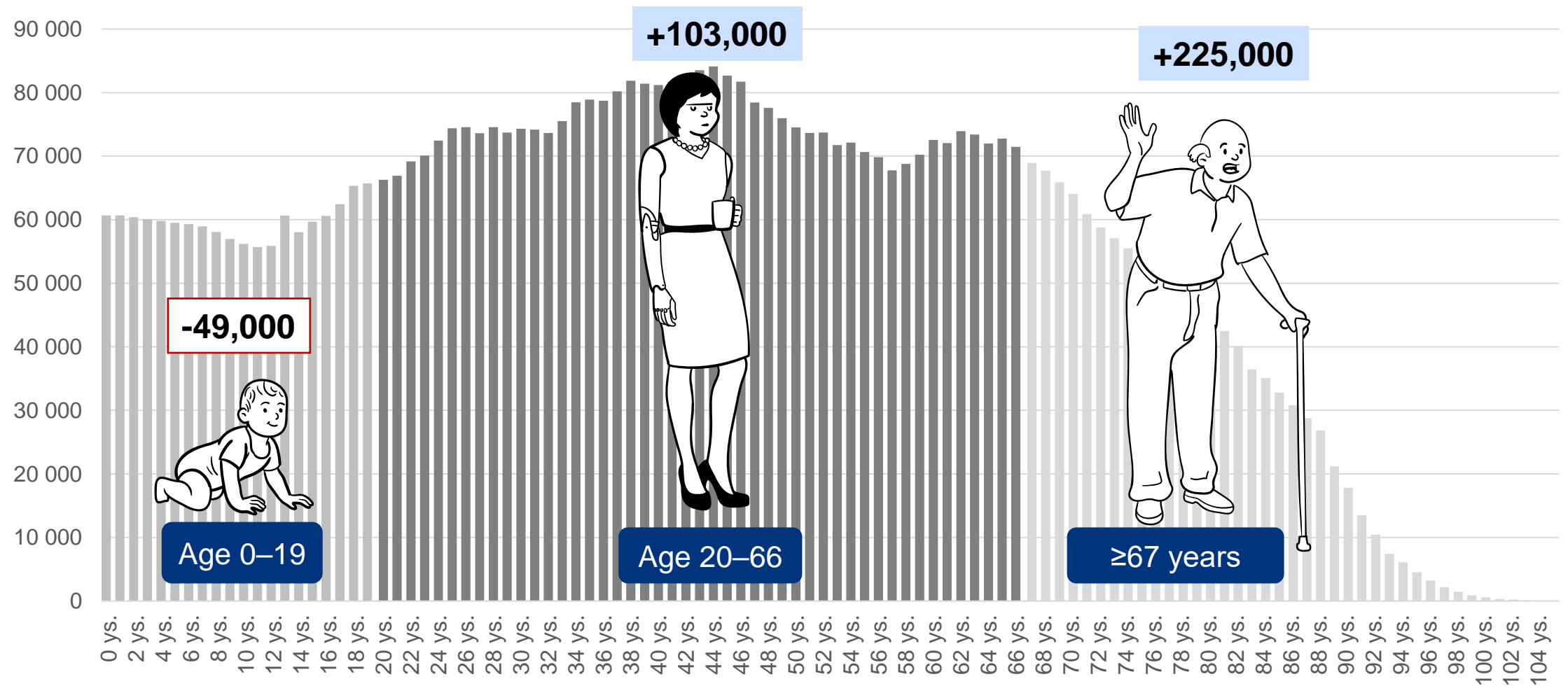
Source: Statistics Norway population projection, mean alternative, June 2024

Consequences for Nav

- Modest consequences for workload overall – 3 of 4 Nav employees work with users of working age
- 24-percent increase in users of assistive technology will be a challenge for Nav
- Increasing gap between expenditures and revenues in the National Budget, which will lead to increased demands of efficiency in the public sector
- Could lead to expectations of Nav providing employment-oriented follow-up to more user groups than today – which will require more counsellors at Nav offices

Population, 2025 and 2035

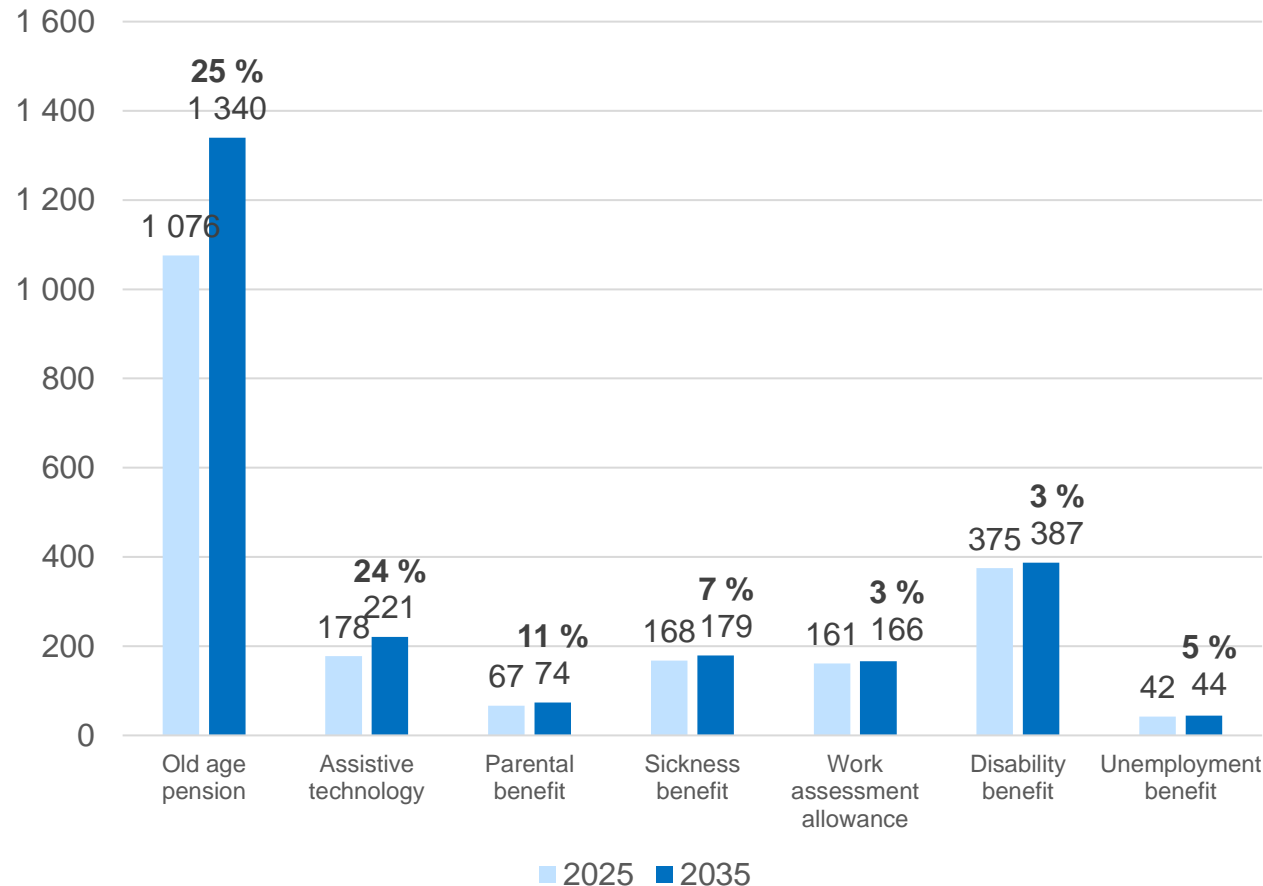
4 of 5 new citizens in the 67+ age group



Source: Statistics Norway population projection, mean alternative, June 2024

Strong increase in pensions and assistive technology

Annual average for number of recipients (figures in 1,000) and change in percent, 2025–2035



Consequences for Nav

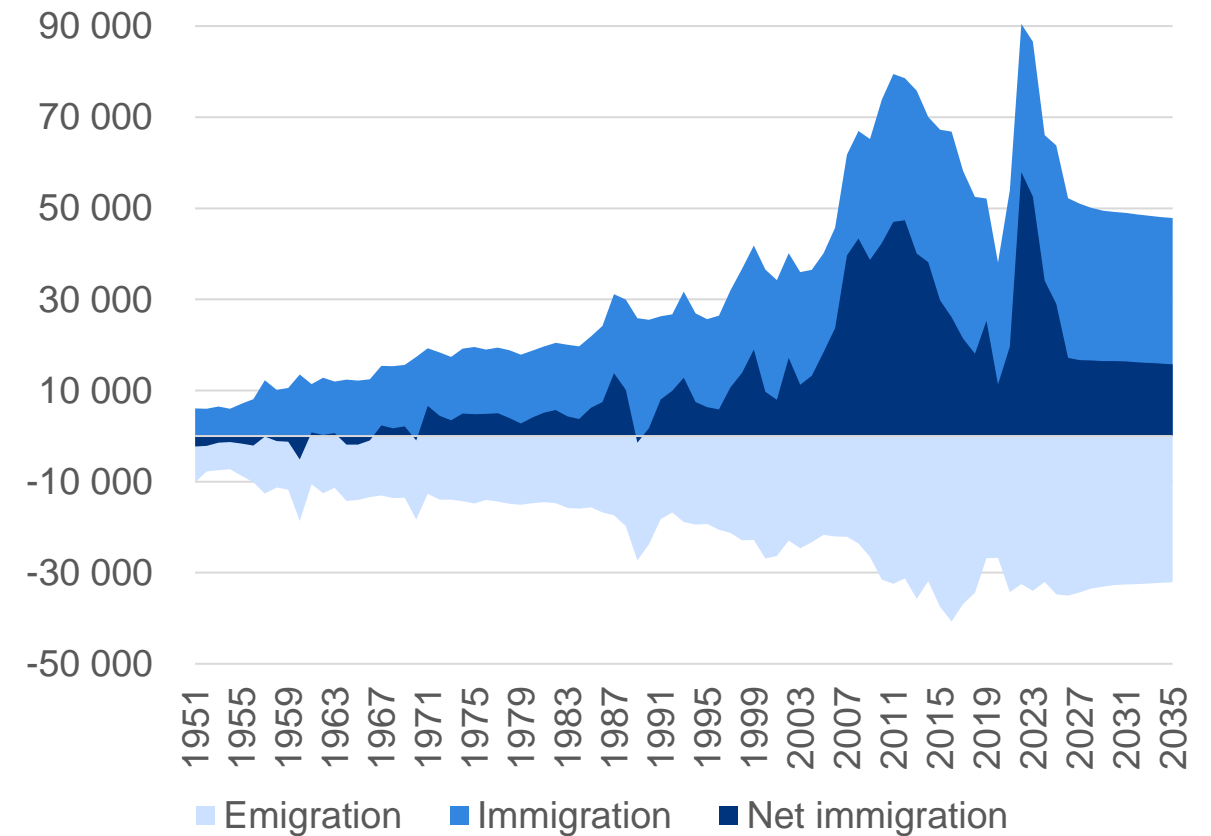
- The population increase among the elderly means more pensioners and more demand for assistive technology
 - Requires innovation to counter capacity challenges
 - Pension reform in the public sector will increase number of old age pension recipients toward 2029
 - More elderly people live at home for longer, increased demand for in-home adaptations
 - Increased demand for workplace adaptations could further increase demand for assistive technology
- Moderate growth in the number of recipients of family benefits

Source: Nav



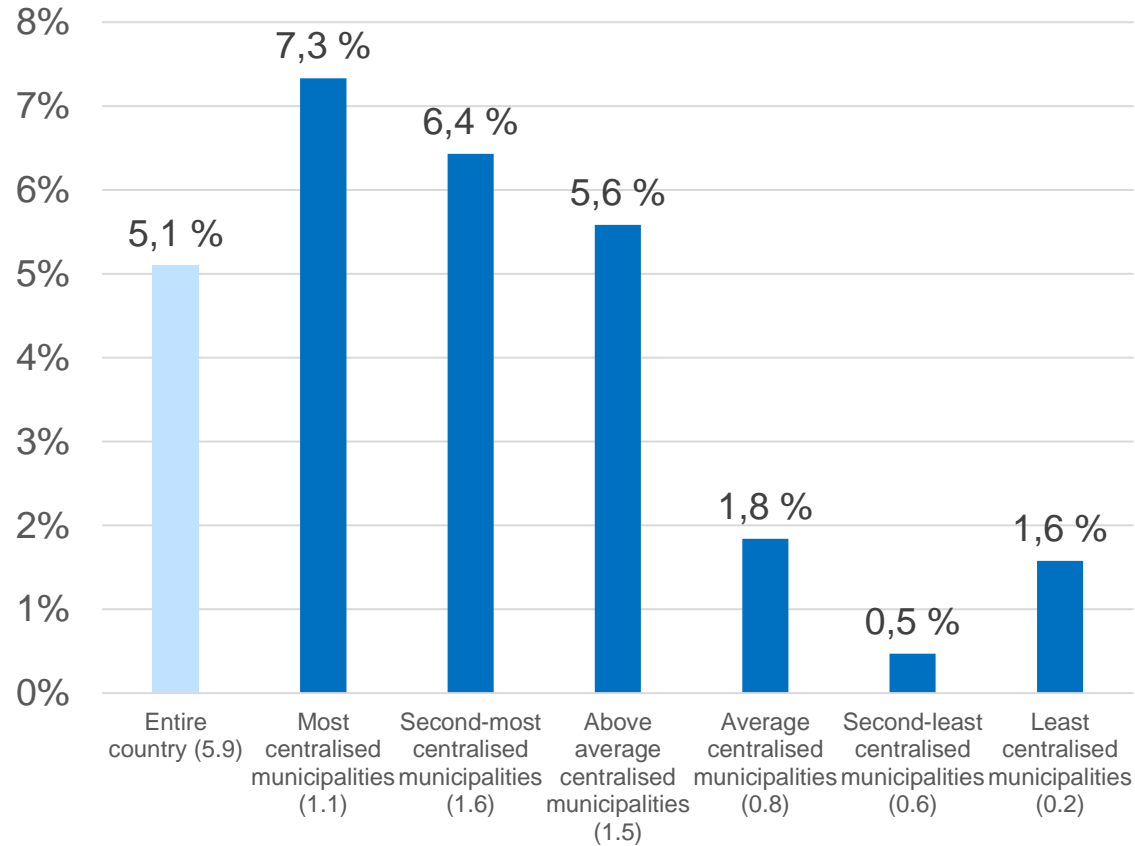
Photo: Pixabay

Lower net immigration, climate change, war/conflict and labour shortages mean increased uncertainty



Source: Statistics Norway population projection, mean alternative, June 2024

Strongest increase in centralised municipalities 2025–2035



Figures in parentheses show population in millions for each category of municipalities

Source: Statistics Norway population projection, mean alternative, June 2024

Consequences for Nav

- Centralisation continues
- Competition for labour:
 - Regions with rapidly ageing populations will face labour shortages
 - Also applies to recruitment to Nav and local partners
- Reduced demand for Nav services in municipalities with a shrinking working-age population

When will the number of **old people (age 65 and up)** surpass the number of **young people (age 0–19)** in each county?

Innlandet	2019
Nordland and Telemark	2022
Vestfold	2026
Østfold, Møre and Romsdal and Troms	2027
Buskerud and Finnmark	2028
Trøndelag	2031
Agder and Vestland	2032
Akershus and Rogaland	2038
Oslo	2046



New demographics tool

Improved insights into local population developments

Try the tool
here!

Befolkningsutvikling i din kommune i 2035:

- Nesten all befolkningsvekst kommer blant eldre

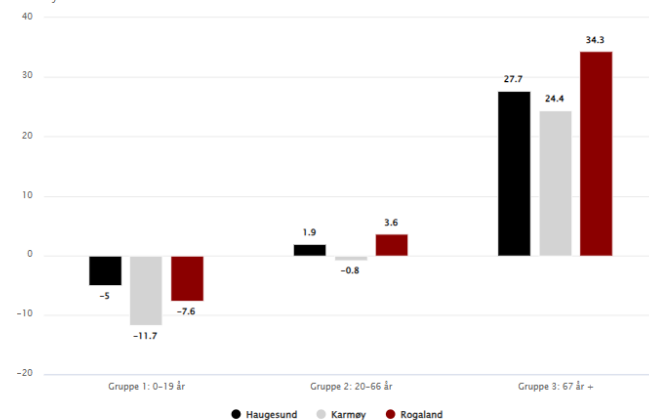
Velg din kommune:

Haugesund

Velg kommunen du ønsker å sammenligne med:

Karmøy

Figur 1. Befolkningsvekst i Haugesund kommune, sammenlignet med gjennomsnittet i fylket, og Karmøy kommune. Prosent.



Haugesund kommune i 2035:

Aldringen av befolkningen treffer sentrale og mindre sentrale strøk. I over halvparten av kommunene er det ventet befolkningsnedgang i yrkesaktiv alder. Dette vil blant annet gjøre det vanskelig å rekruttere kompetent arbeidskraft i distriktene, men også rekruttering til Nav.

Ved inngangen til 2025 bor det 38 441 personer i Haugesund kommune. Fram mot 2035 er det ventet at befolkningen vil øke til 40 047 personer. Av disse blir det..



424 færre barn og unge



455 flere i yrkesaktiv alder (20 - 66 år)



1724 flere eldre (67 år og oppover)

We also
recommend
Fremtids-
verktøyet
2040
from KS

Labour market



Labour market toward 2035

- Labour shortages
- Changes in skill demands
- Protectionism and geopolitical uncertainty



Photo: Microsoft stock
images

Ageing leads to labour shortages

- Considerable shortage of health personnel
 - 2025: Shortage of approx. 11,000
 - Shortage of 30,000 nurses and 24,000 health workers by 2040
- Also shortage of workers with trade certification
- Good opportunity for including more people who are outside the workforce

Vil trenge 180.000 flere i helsevesenet

Framover vil Norge få flere eldre, færre unge og på kort sikt mer penger å rutte med. Men i helsevesenet tikker en stor mangel på arbeidskraft som politikerne ikke kan kjøpe seg ut av.



Karoline Johannessen Litland
Journalist



Anders Barringbo
Journalist

Publisert 9. aug. kl. 11:45
Oppdatert 12. aug. kl. 15:42

Navs bedriftsundersøkelse: Fortsatt stor mangel på helsepersonell i Norge



VI Å HA FLERE: Også i år er behovet for arbeidskraft størst i helse- og omsorgssektoren. Her mangler det omtrent 13 000...

LES MER



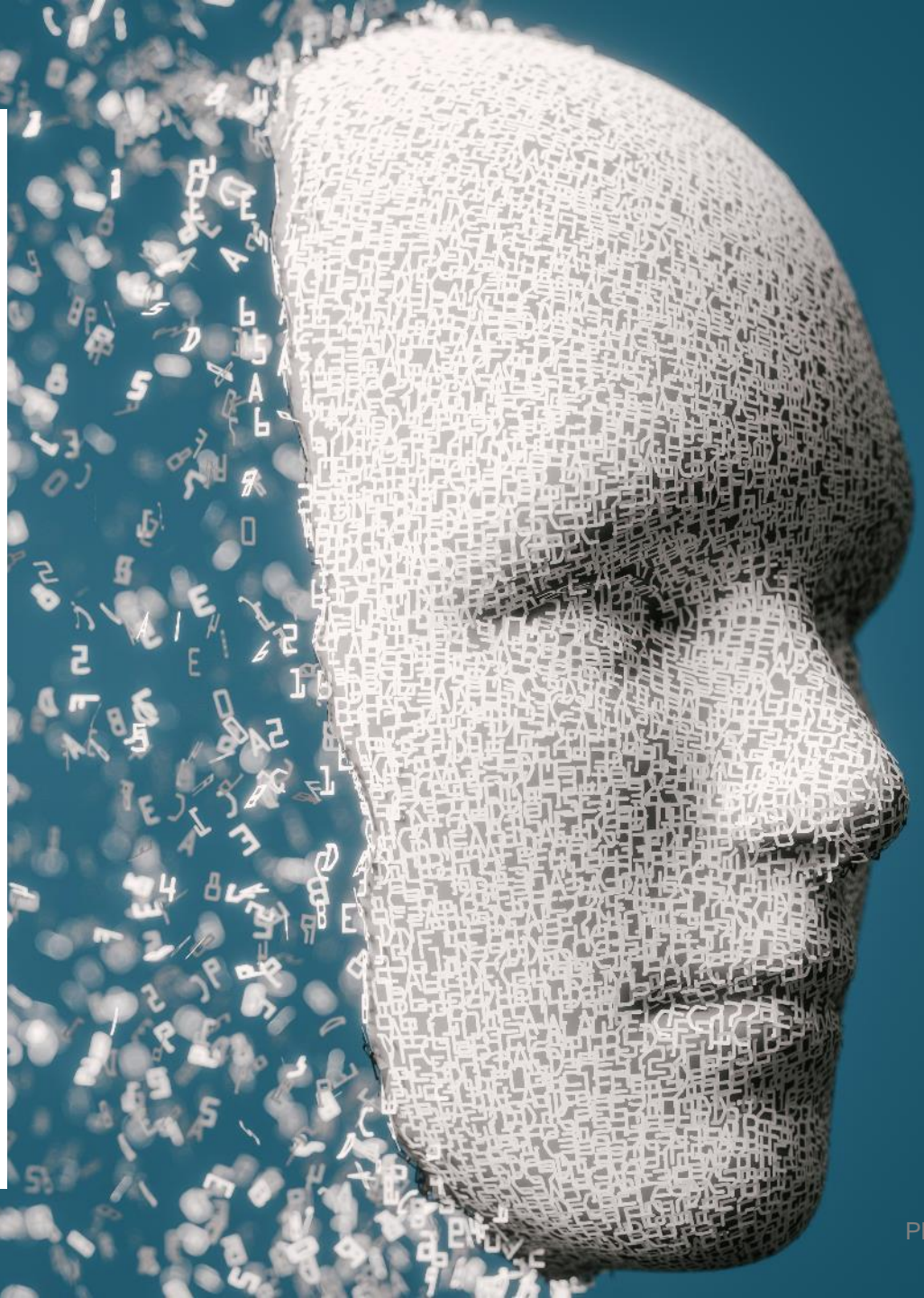
2017-2020. Tre år som er svært spennende for MEDIQ, sier Inger Lise Blindheim i NAV. I dag jobber hun som produktansvarlig for selskapet MEDIQ Norge. Foto: Privat

Stor mangel på helsepersonell: – Jeg sluttet da barn nummer to kom

Helse- og omsorgssektoren skriker etter folk, viser en rapport fra NAV. Størst er mangelen på sykepleiere. – Hverdagen gikk rett og slett ikke opp lenger, forteller tidligere sykepleier Inger Lise Blindheim.

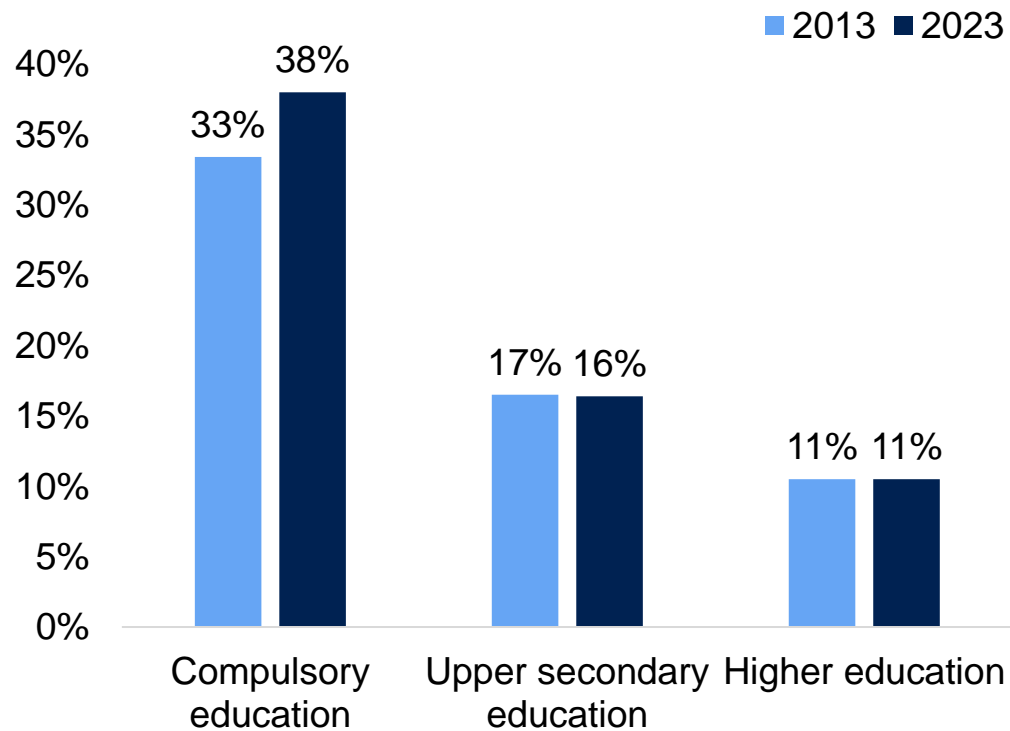
Technological development

- 9 % of jobs in OECD countries have a high proportion of automatable tasks. Norway less at risk than many other countries
- Lower educated workers are most vulnerable
- Net effect of job creation and job loss is uncertain, but likely positive
- AI may boost productivity and provide new opportunities
 - Estimates range from 0.5 % to 9 % in the next decade



Increasing exclusion among unskilled workers

Share of population aged 20–66 not in education, employment or training



Source: Statistics Norway



Photo: Colourbox

Green transition

- Reduced employment in the oil and gas industry
- Expansions in offshore wind energy, hydrogen and battery production
 - Profitability challenges and global uncertainty affect the pace of the green transition
- Nav can facilitate restructuring and competence-building



An uncertain world

- Trade conflicts and geopolitical unrest leads to uncertainty
 - Affects exports and could reduce growth
- Increased European self-sufficiency could also create opportunities
 - Increased investments and defence spending
 - More regional trade, could lead to new industrial growth



Photo: Microsoft stock images

Focus on skills

- Shift resources to lifelong learning and competence development
- Counselling should focus on educations and careers with good opportunities
- Improved collaboration between Nav, the educational sector and employers

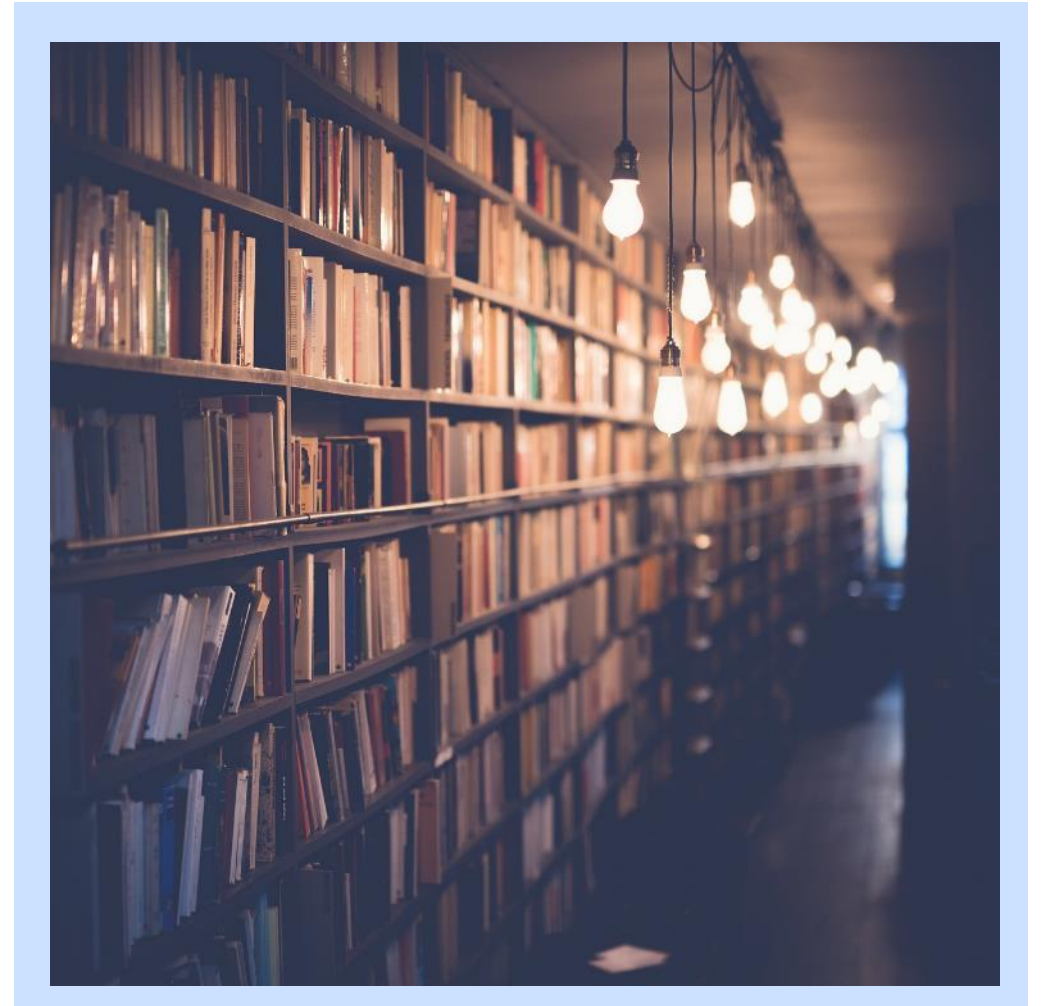


Photo: Pixabay

Scenarios for outcomes of the global trade conflicts



Return to status quo

Negotiations largely successful, conflict reduced

Tariffs eventually returning to previous levels



Trade virtually unchanged

Minor consequences for global economy

No extraordinary measures within Nav, but must be able to respond quickly if necessary



Tariffs remain

The announced tariff levels are maintained, but not escalated further



Minor reduction in exports, reduced investments and reduced growth

Minimal impact on unemployment, but restructuring between industries

Increased focus on restructuring, somewhat increased need for income protection



Escalating trade war and global recession

Economic uncertainty affects operations and investments

Trust is undermined



Negative spiral: Reduced growth, price of oil drops, insolvency increases

Increased unemployment in export-dependent counties

Nav must increase capacity for processing and follow-up

Increased need for crisis management

User expectations



Photo: Pixabay

Technological developments shape expectations

- Merging the digital with the analogue
- Digitisation and new technology: Barriers and opportunities
- (Digital) generational change?



Photo: Microsoft stock images



Personal users and employers share the same expectations

- Cohesive services across the public sector
- More targeted inclusion in the workforce and long-term plans

Personal user expectations

- Expectation of being seen as a whole human being, in the encounter with both services and employees within Nav
 - More thoughtful interaction between digital services and personal assistance
 - New technology can be inclusive, but can also create new barriers
 - Need for relational competence
- Personalised services
- Co-determination at all levels



Photo: Microsoft stock
images

Expectation gaps and dilemmas toward 2035

Simplification,
automation and a more
efficient Nav that does
not spend too much of
taxpayer's money



Personalised services
and follow-up, person-
to-person interactions

Employer expectations

- Facilitation for inclusion
 - Nav has knowledge of the local labour market and takes a long-term approach to meet needs
- Presentation of opportunities and prevention of sickness absences

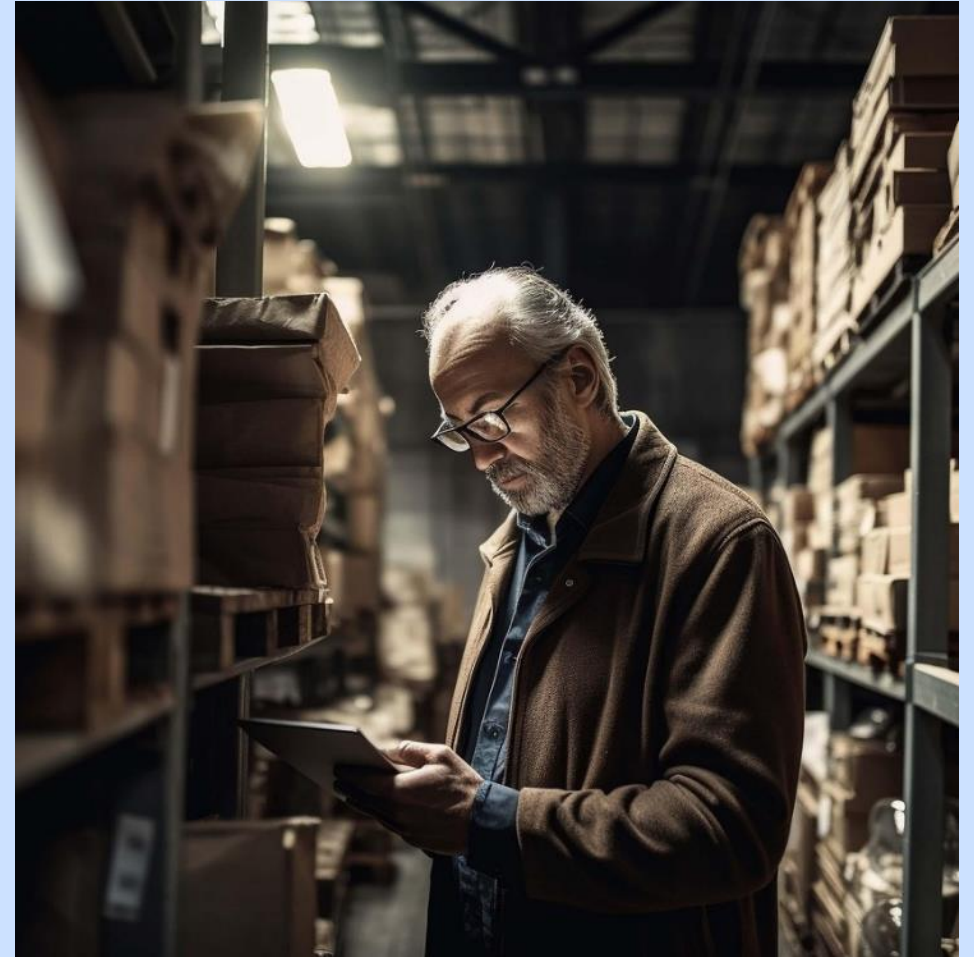
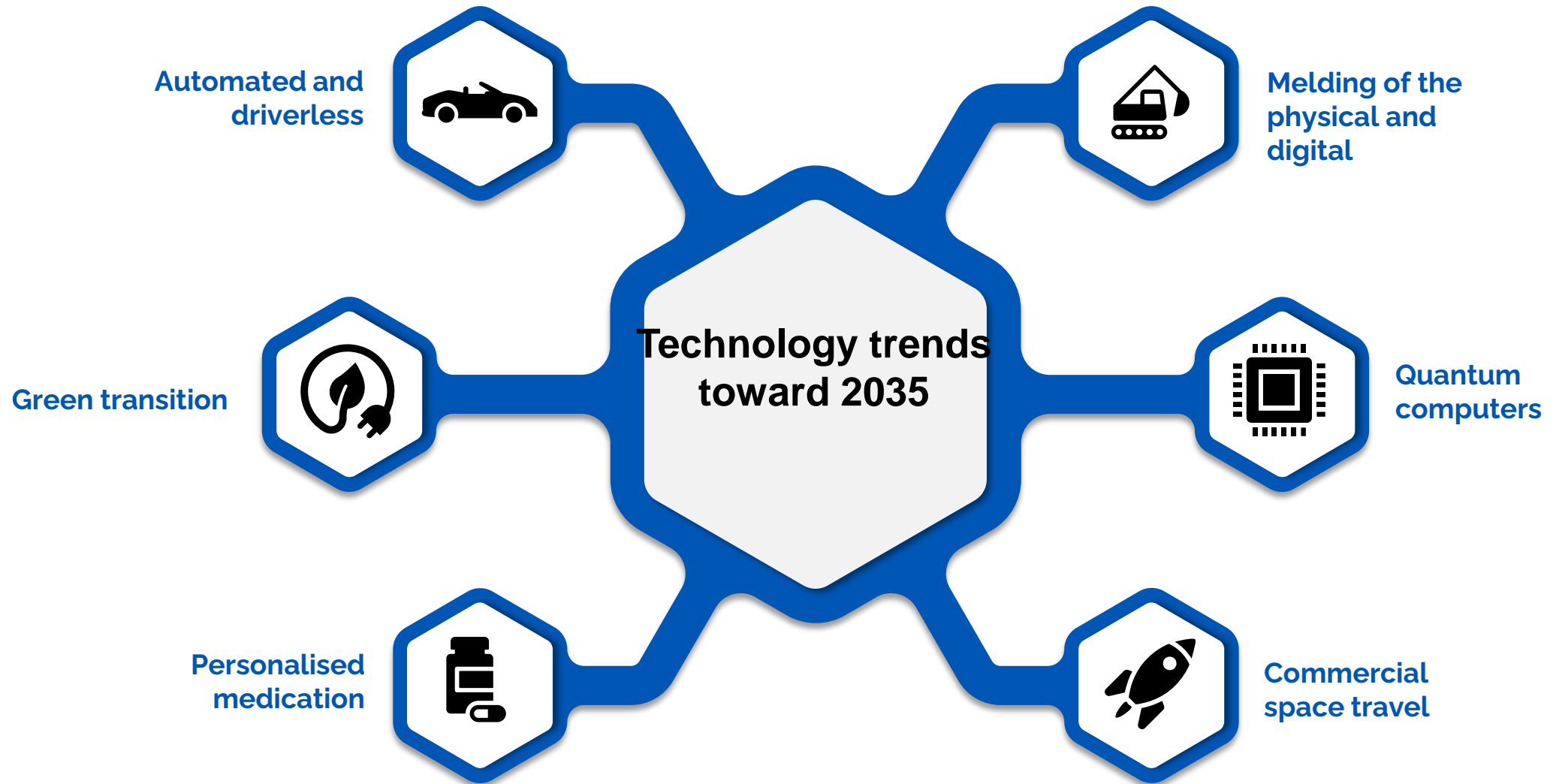


Photo: Pixabay

Digital technology







Melding of the physical and digital

Mixed reality

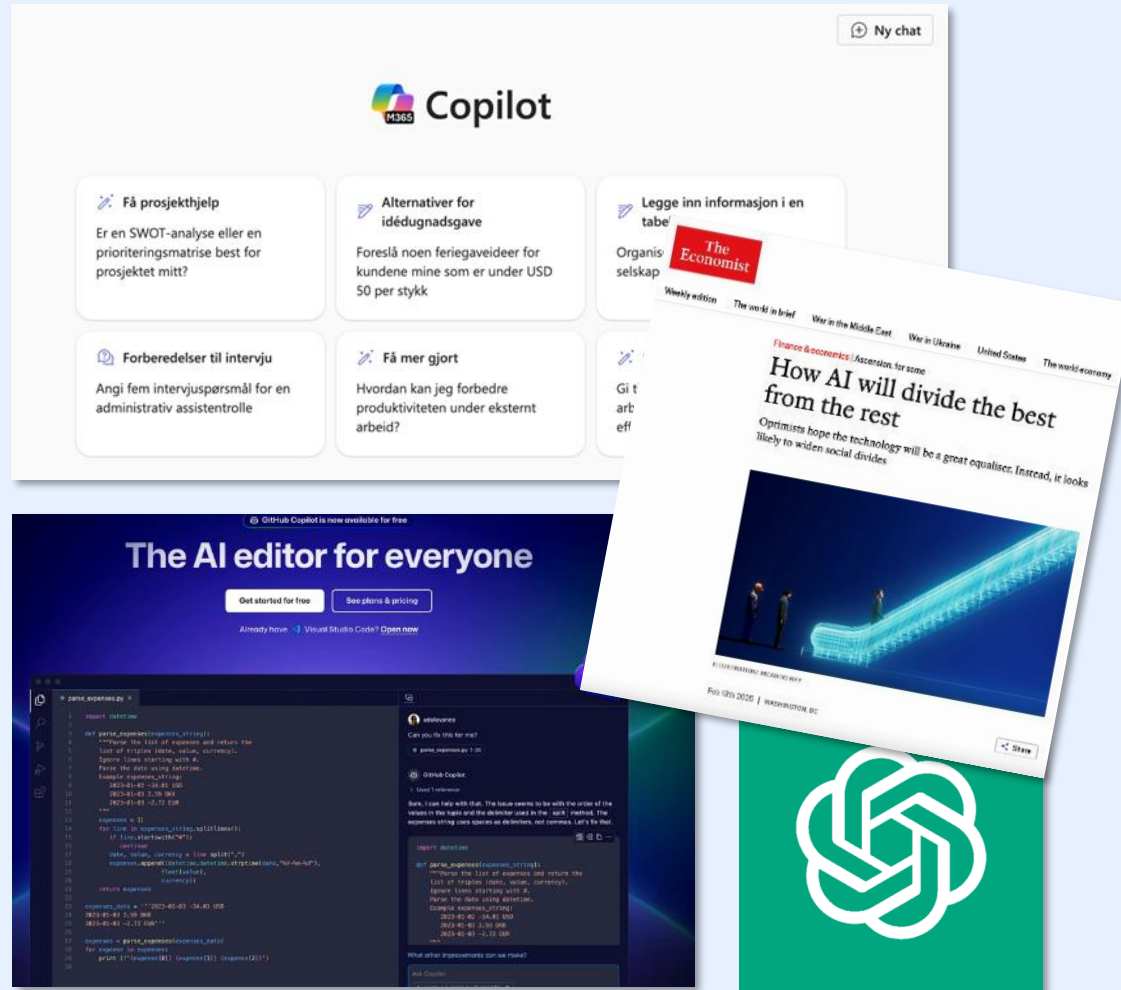
- New ways of communicating and meeting
- Opportunity to practice challenging situations
 - Work training
 - Guidance
- Limited applications as of yet

One common thread...

Artificial intelligence
and generative models



Artificial intelligence seeps into tools we use every day



- Eases workloads
- Lowers threshold for programming, image editing, plain language/translation, analyses
- Will AI erase or exacerbate differences?

Artificial intelligence in Nav

Current/coming examples

- “Librarian” for counsellors at the Nav Call and Service Centre
- Privacy protection
- Improved job listings
- Minute transcriptions
- Coding assistant

Future opportunities

- Decision support in case processing and assessment of follow-up needs
- New tools and improvements in universal design
- Translation, interpretation and multilingual communication
- Learning modules and courses

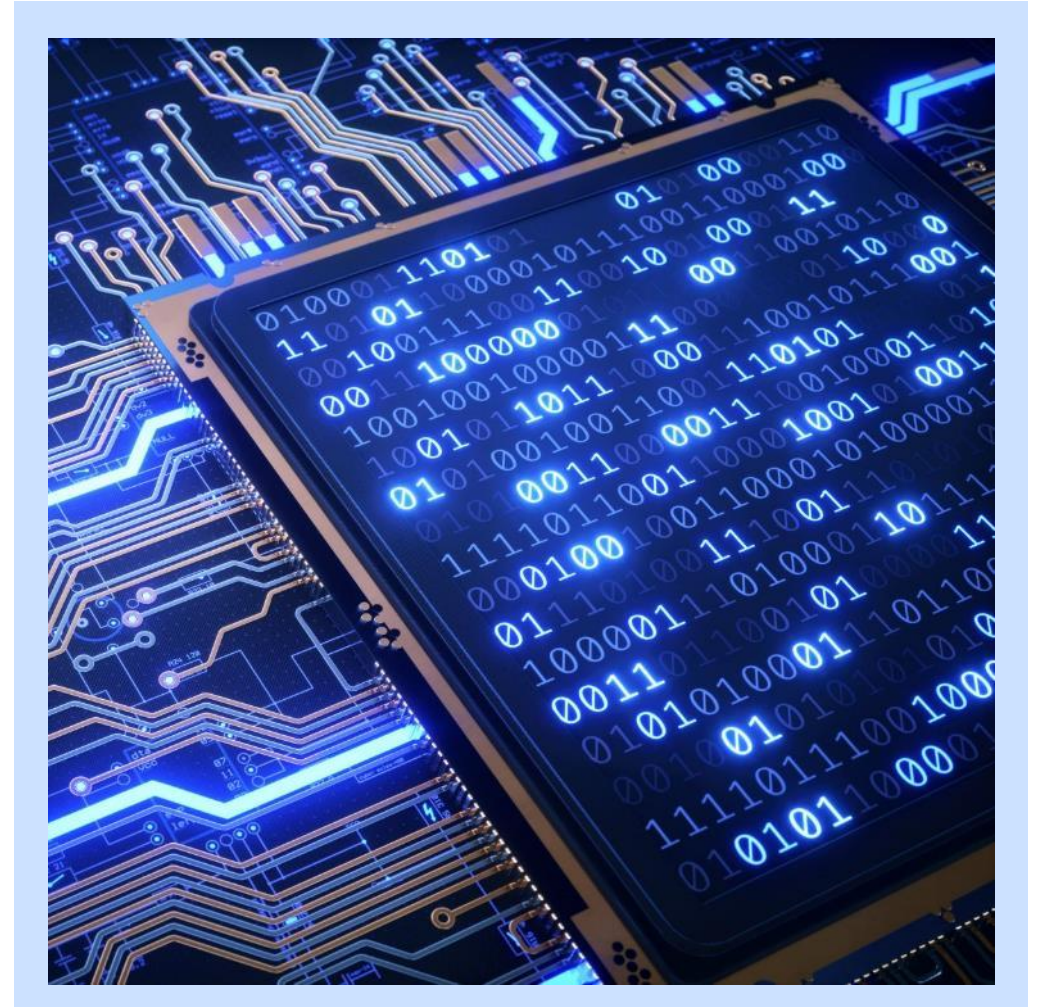


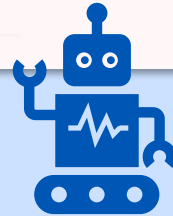
Photo: Microsoft stock
images

Digital vulnerabilities – disinformation, fraud, cyber attacks

- False identities
- Fake news
- Forged documents
- Smear campaigns
- False websites and reports



Conditions for digitisation



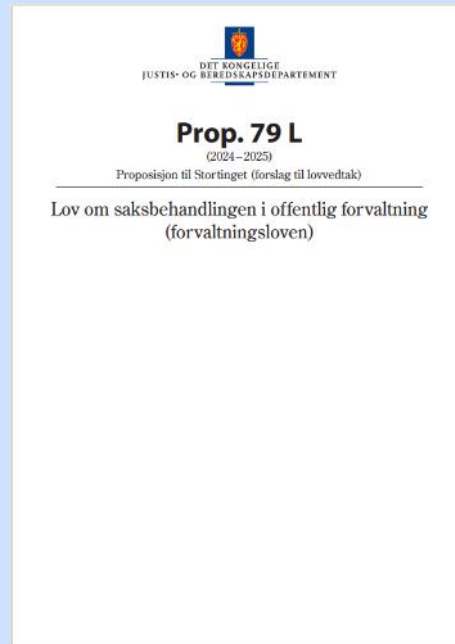
Office of the Auditor General:
“Few examples in the public sector
where AI produces significant benefits,
vast untapped potential”



Digitisation strategy:

- 80 % of government undertakings will implement AI by 2025 – all by 2030.
- Potential applications: *Automation of routine tasks, decision support, risk and deviation analysis, resource allocation, user personalisation.*

Legal constraints



The digitisation trends we have
seen
before 2025...

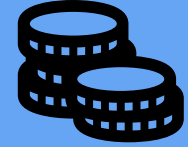
Uncertainties in digitisation



...are not necessarily the one that
will dominate toward 2035

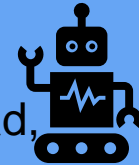
How to digitise?

Financing models, best value
for money
Access to expertise



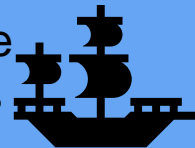
How to get it right?

AI is predicted to have the same
disruptive power that smartphones had,
but there are legal and ethical risks

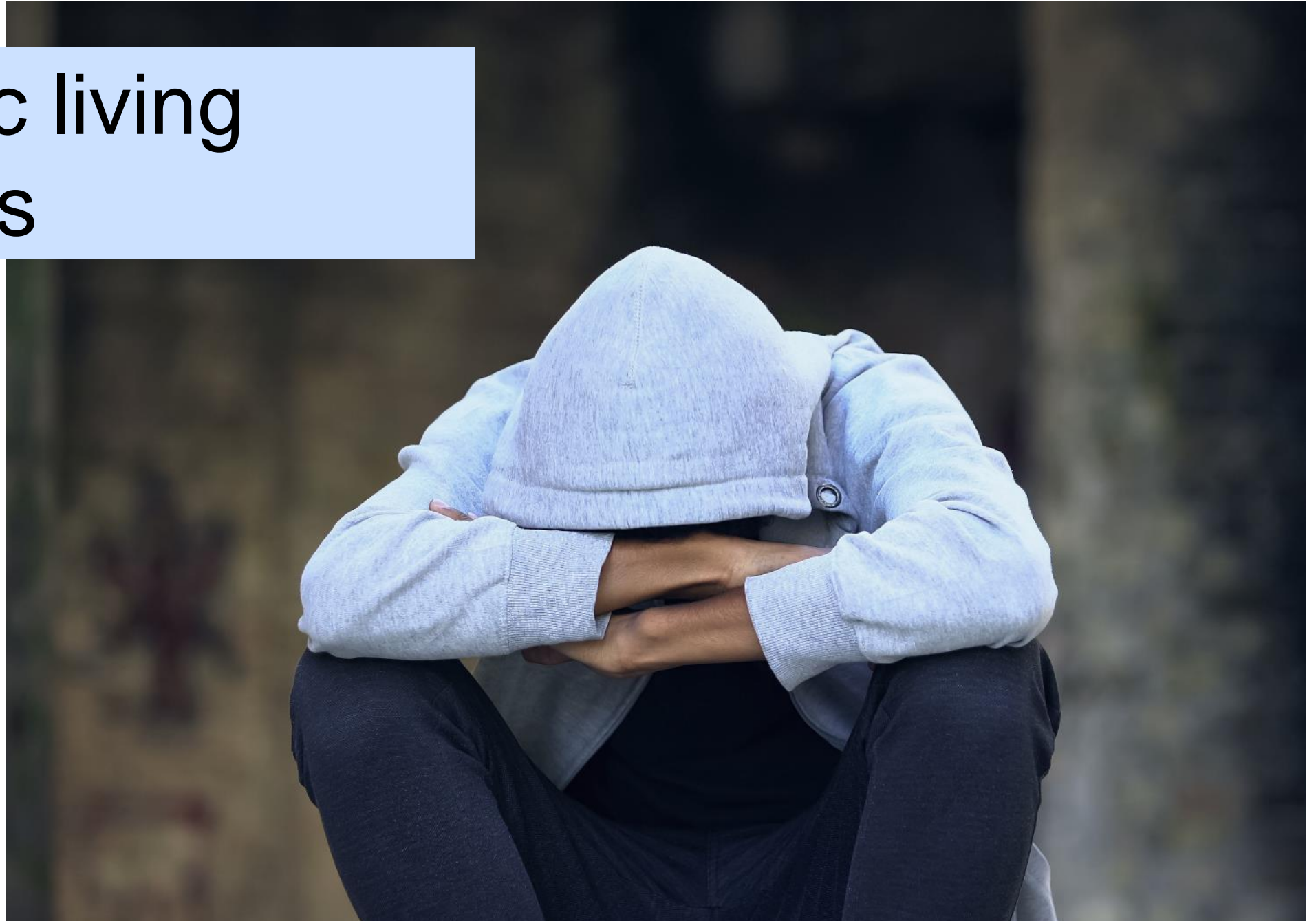


How to trust anyone?

The choice of digital tools could have
geopolitical and security implications



Economic living conditions



Incomes increased for all groups, but levelled off over last decade

Median after-tax income with indexed prices
(1996=100= per consumption unit (EU scale))

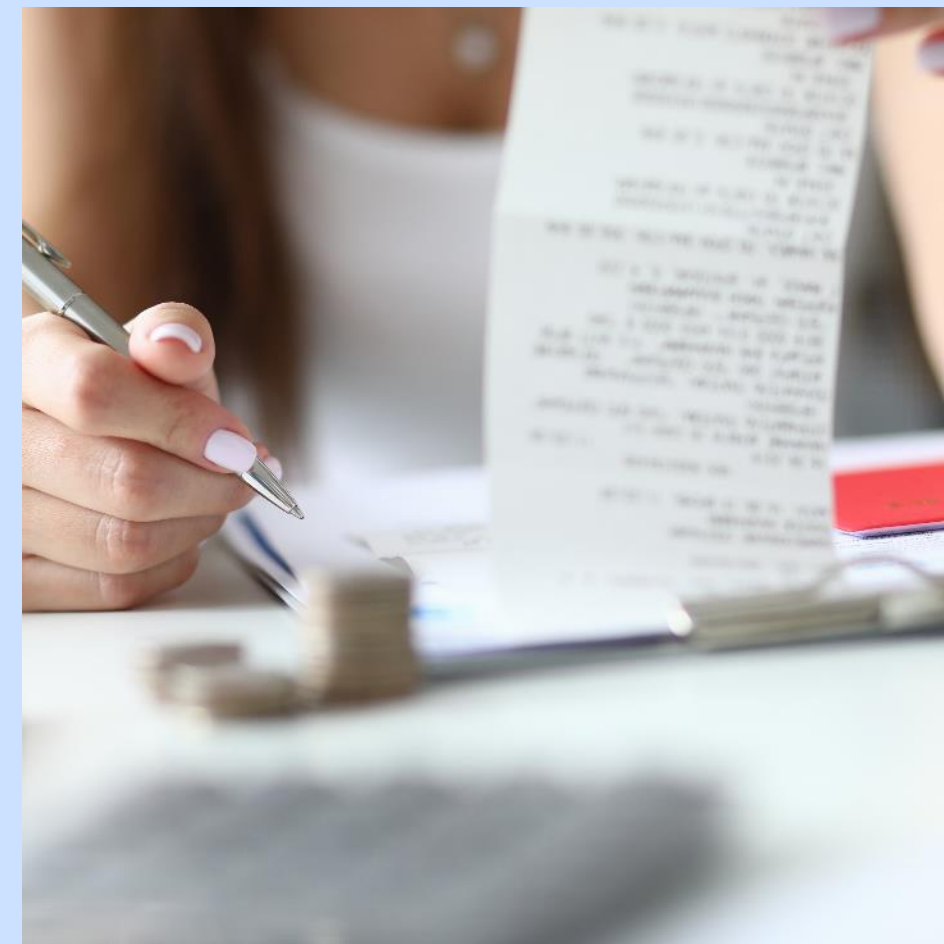
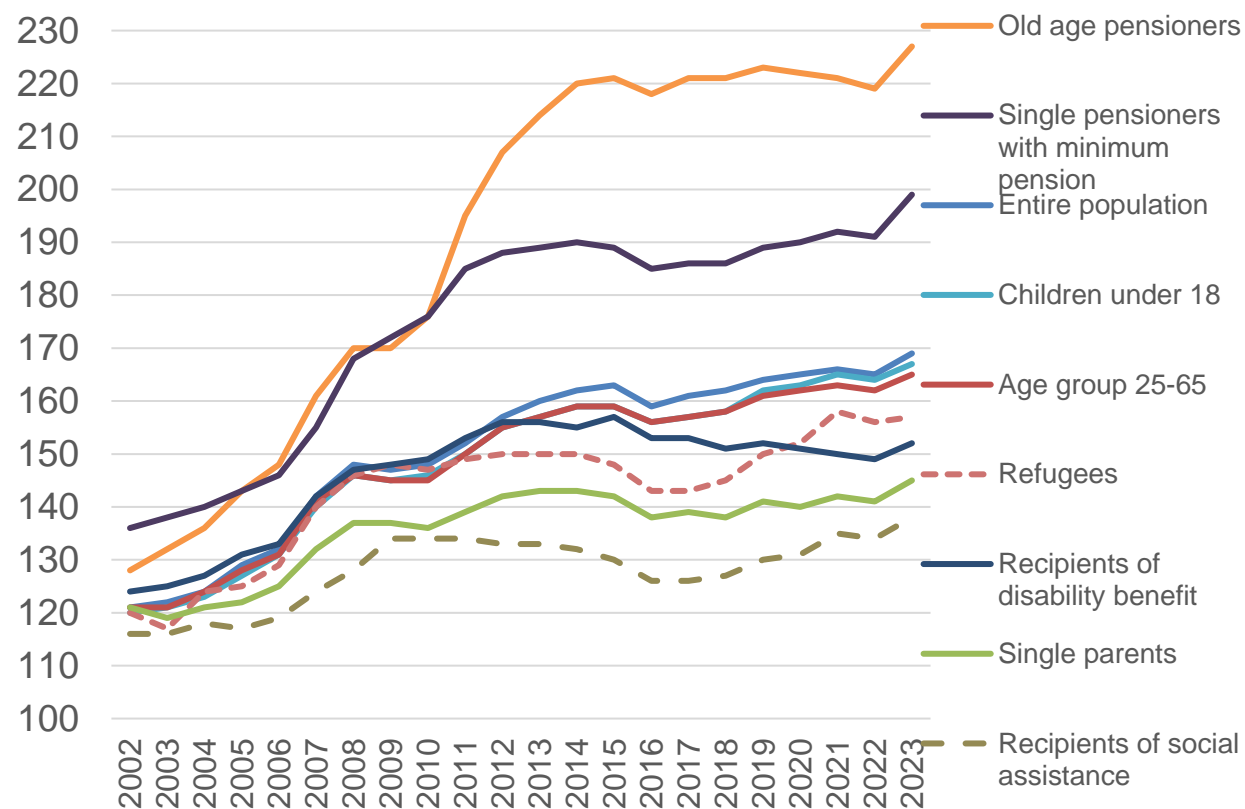


Photo: Colourbox

Fewer Norwegians with strained finances than in the EU, but increase after 2020

Number of people who report that it is difficult/very difficult to make ends meet

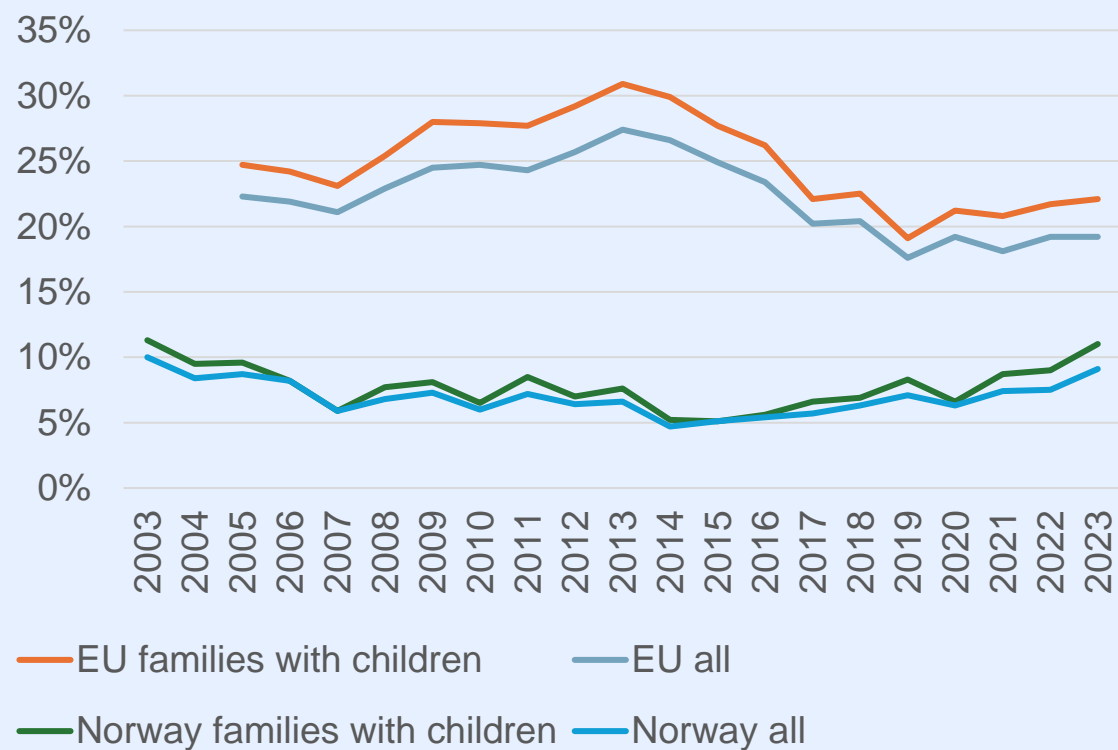


Photo: Microsoft stock images

Tight finances most common in family-building phase (age 25–44)

Number of people who report that it is difficult/very difficult to make ends meet

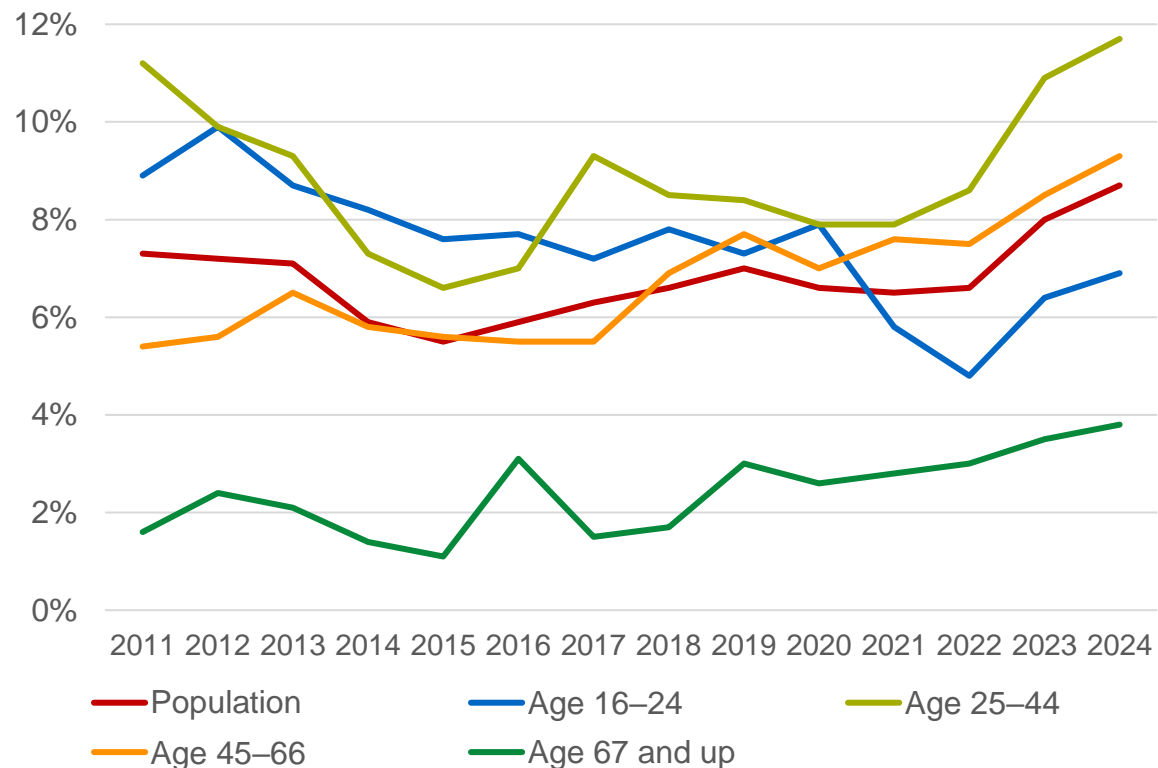


Photo: Microsoft stock images

Recently arrived refugees have the biggest impact on social assistance

Recipients of social assistance by background

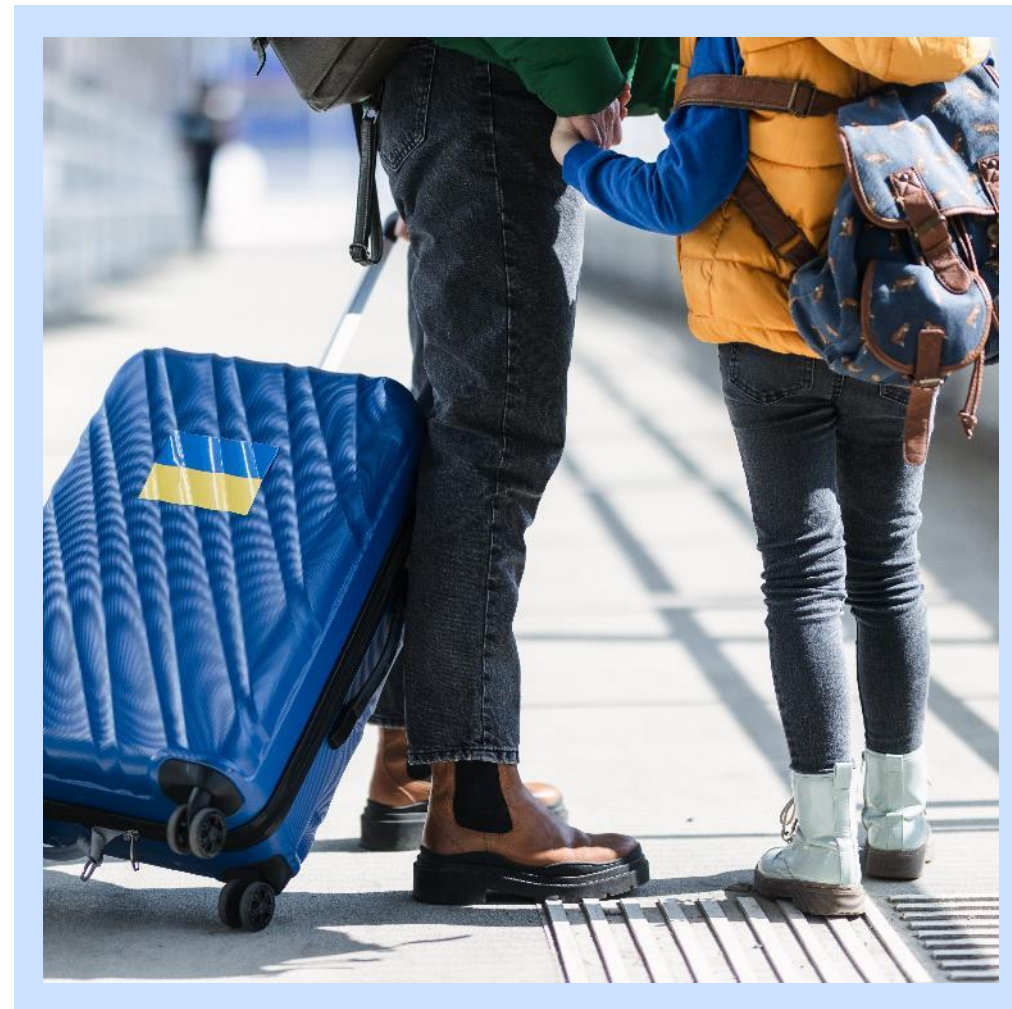
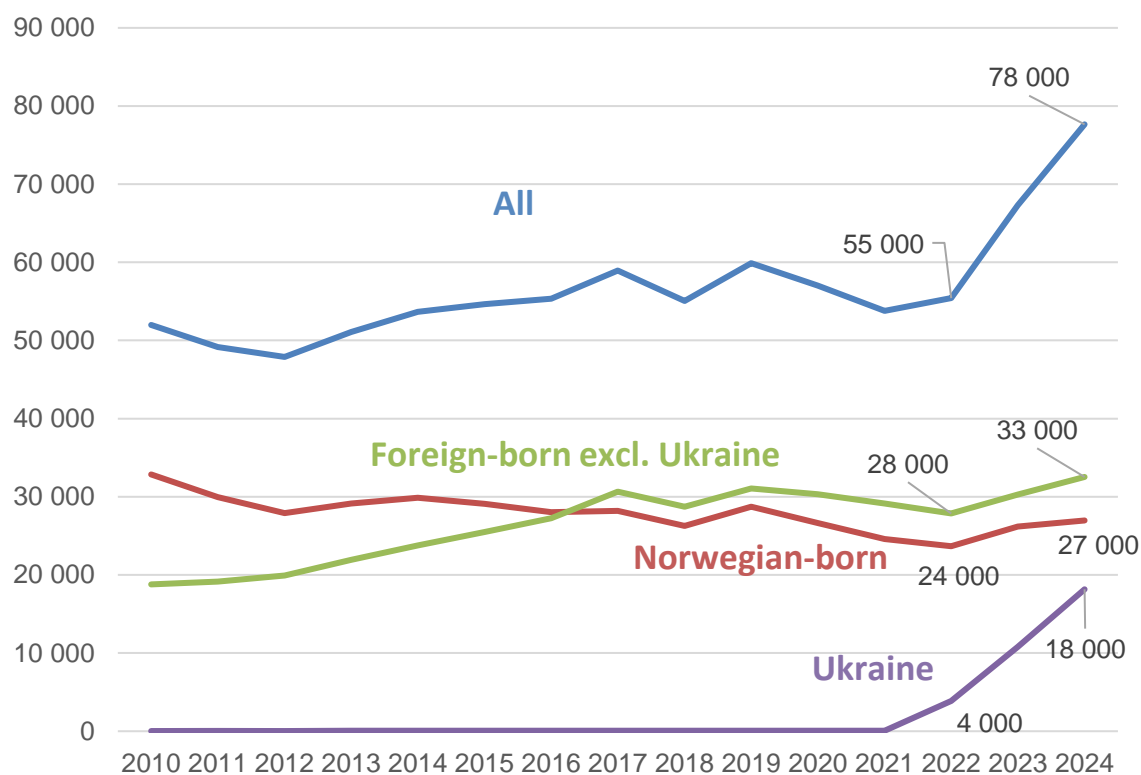


Photo: Colourbox

Scenarios for economic development and need for social assistance

Stable economy
Low unemployment
High employment
Moderate real wage growth
High, but sinking interest rates



Stable or slightly reduced
need for social assistance,
provided the influx of
refugees continues to abate

**Trade conflicts force
restructuring**
Periodically high
unemployment
Continued high inflation and
interest rates
Low real wage growth



Moderate increase in need
for social assistance

Economic setback
Global recession leads to
serious decline
Significantly increased
unemployment
Reduced property values



Significant increase in need
for social assistance

What will influence living conditions and social services toward 2035?



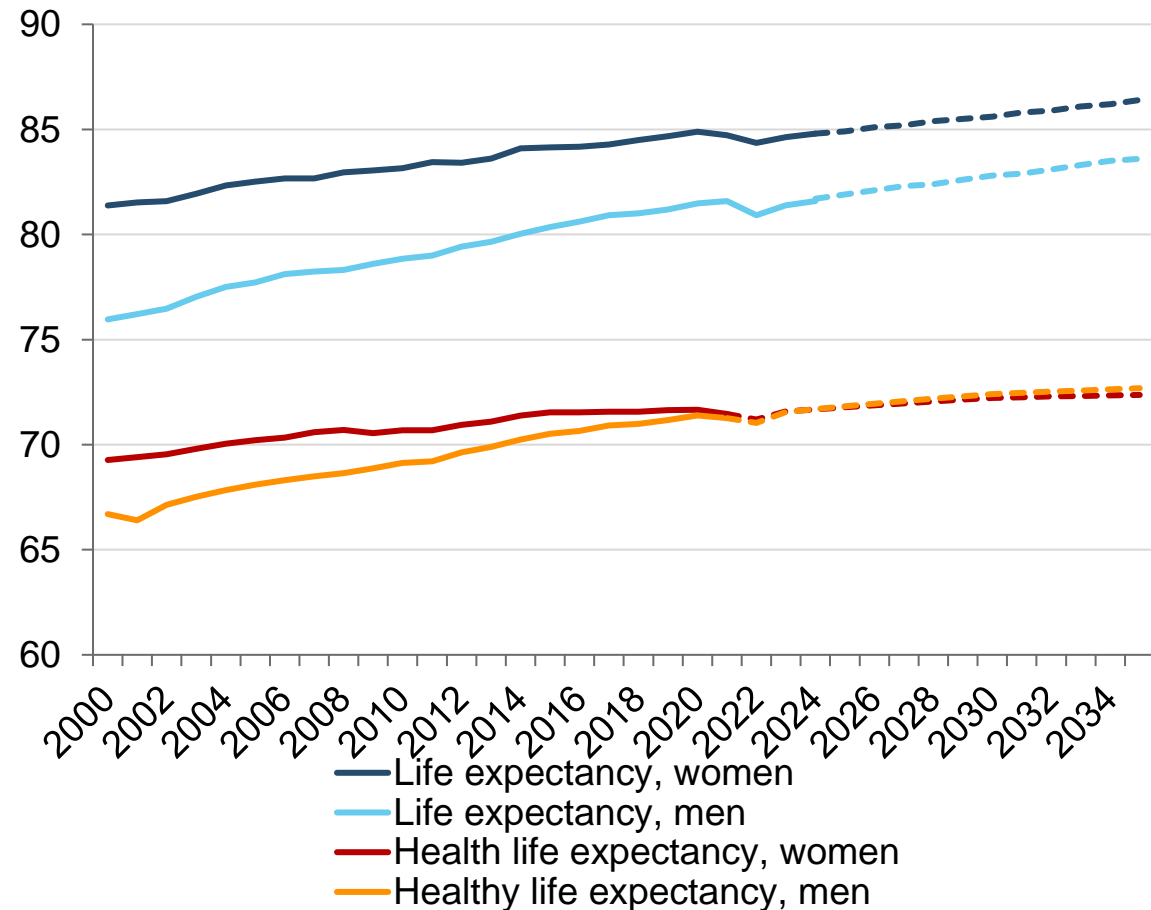
Photo: Microsoft stock images

- Influx of refugees and integration
- Unemployment and economic development: People with high debts are vulnerable
- Policy changes, e.g. child benefit rates

Health



We live longer, but our healthy life expectancy does not increase quite as much



Source: Statistics Norway and Global Burden of Disease Project



Photo: Pixabay

Ageing increases burden of disease curve, but decrease in working age continues

Burden of disease, projected to 2035

(sum of lost life years + non-fatal health loss per 100,000 population)

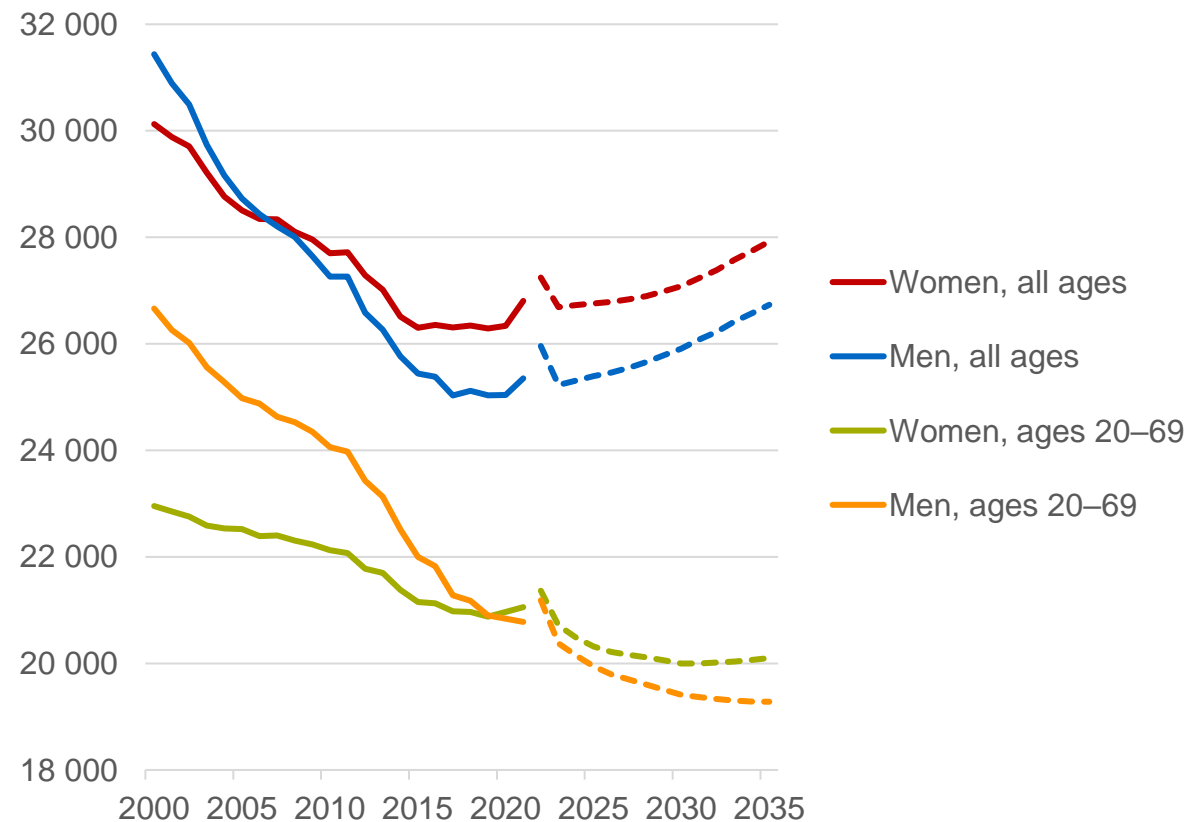
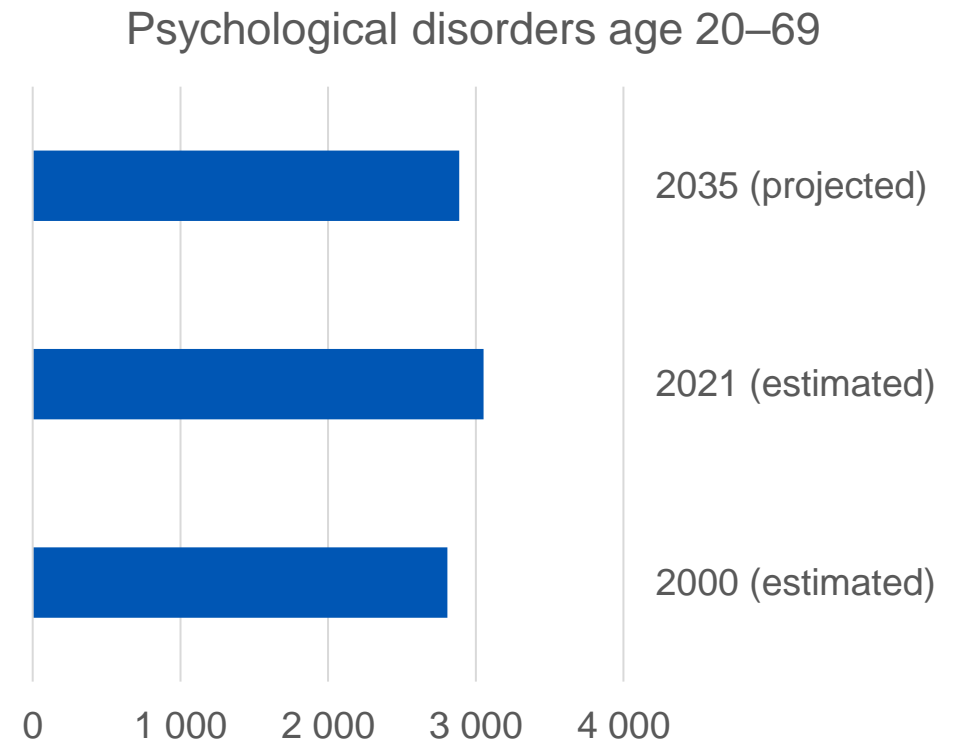


Photo: Colourbox

Mental health problems increasing – but psychological disorders are not

- Self-reported mental health problems have increased in the last decade
- Primary health care service: Increase in inquiries related to psychological disorders and symptoms, especially ADHD and PTSD
- Specialist health service: Slight increase in referrals for psychological and behavioural disorders

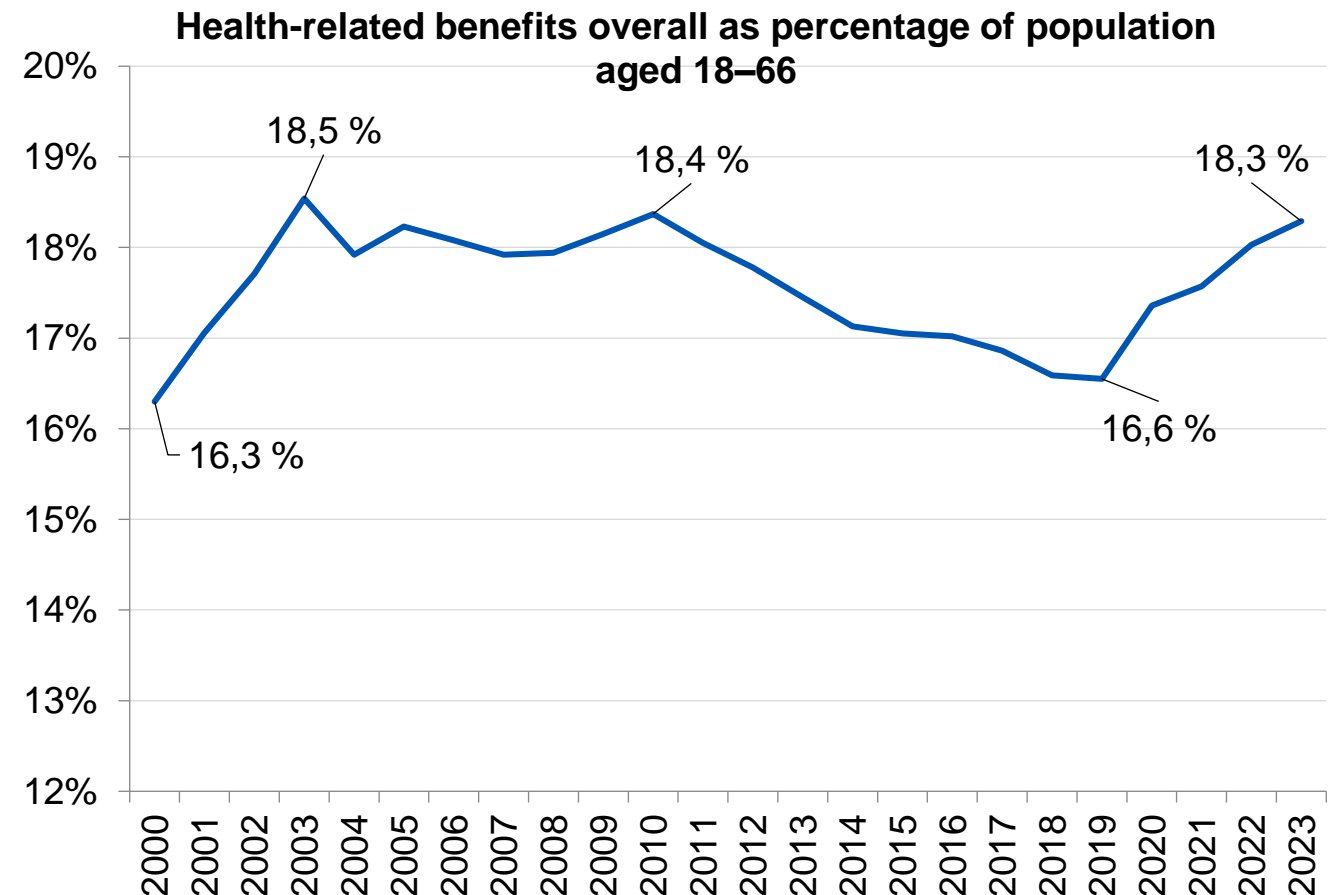
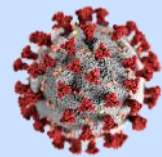
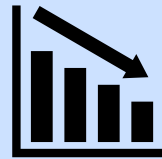
Burden of disease related to psychological disorders
(sum of lost life years + non-fatal health loss per 100,000 population)



Source: Global Burden of Disease Project

Near historic peak for health-related benefits

- Steady decrease 2010–2019
- Increase during and after pandemic
- Still high in 2024–2025 (preliminary figures)



More young recipients (18–29) of health-related benefits, increased share receiving disability benefit

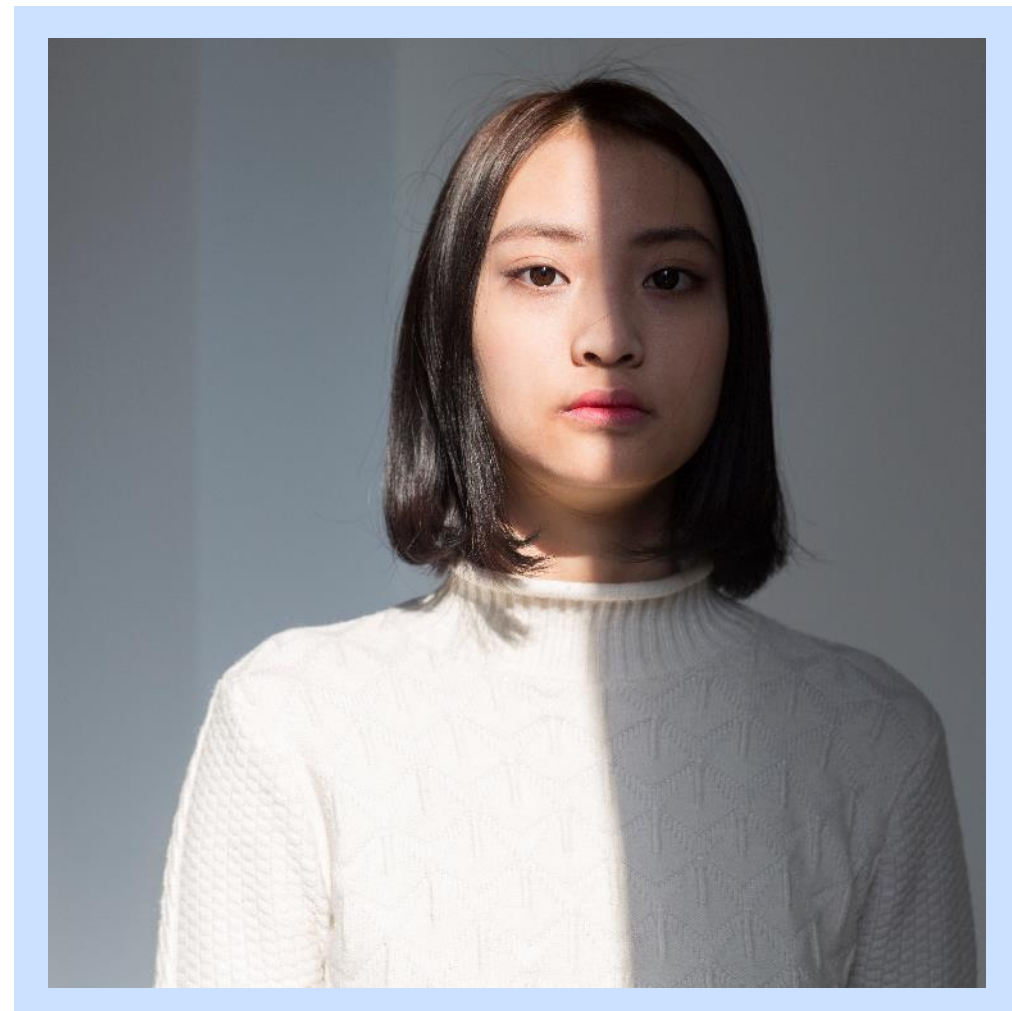
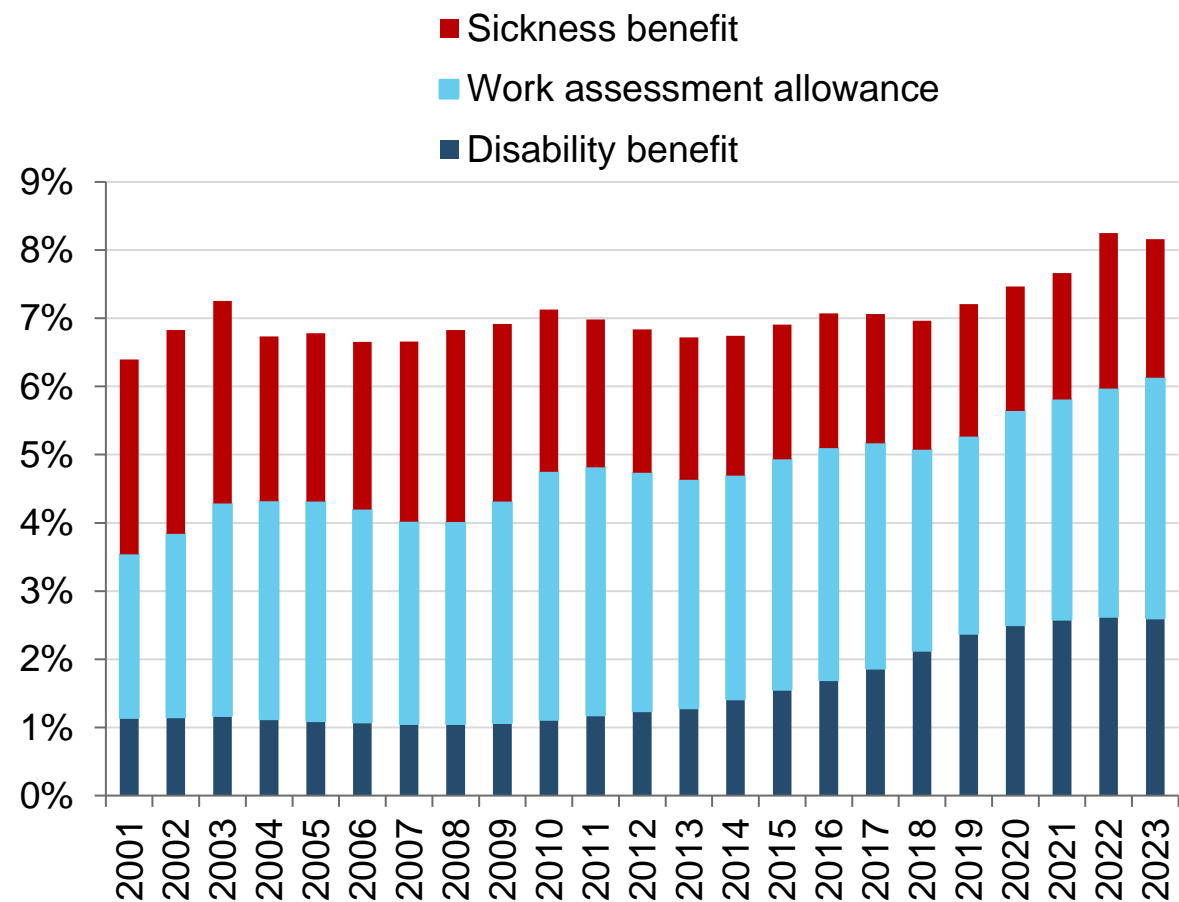


Photo: Microsoft stock images

Health – development toward 2035

Health-related benefits affected by more than health

- Labour shortages improve chances of inclusion
- Restructuring leads to increased risk of labour force exclusion
- Potential policy changes for benefits
- More targeted occupational follow-up

Uncertainties

- Risk of future pandemics
- Increasing antibiotic resistance
- Consequences of refugee and/or climate crisis
- Psychological disorders vs. mental health symptoms and problems



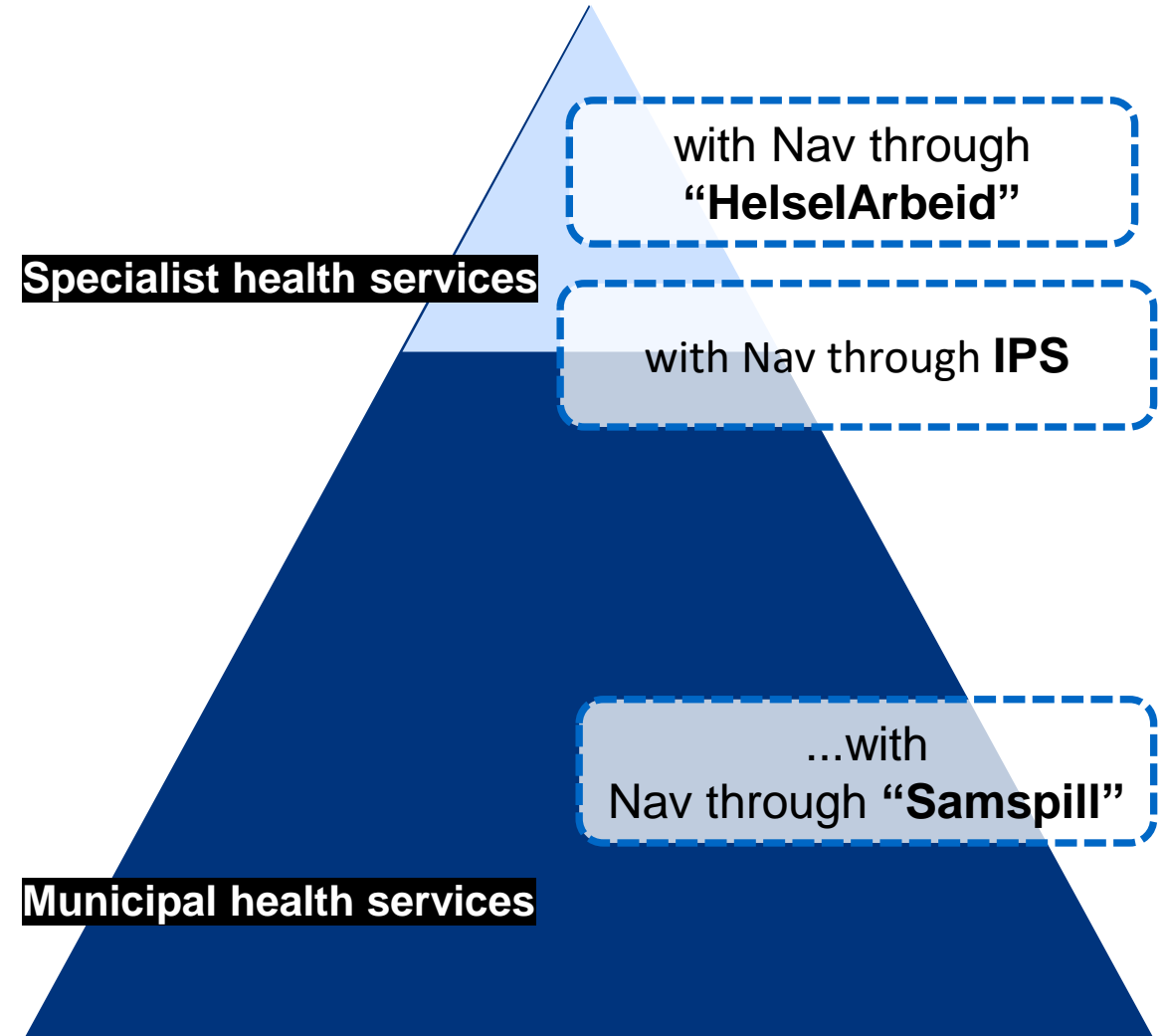
Photo: Pixabay

Work and health

Nav and health services. Need for concurrent and coordinated services for those who need help finding a job or remain in the workforce

Challenges include

- Improve collaboration, information sharing and joint competence development
- Joint models of service interaction



Political trends



Influence of international political trends

- International competition for qualified labour increases
- Tense security situation
 - Defence and security considerations lead to tougher prioritisation, as well as security and preparedness requirements for Nav
 - Tariffs and trade restrictions
- Resistance to environmental and climate policies, but climate problems are increasing
- The EU is important for Norway

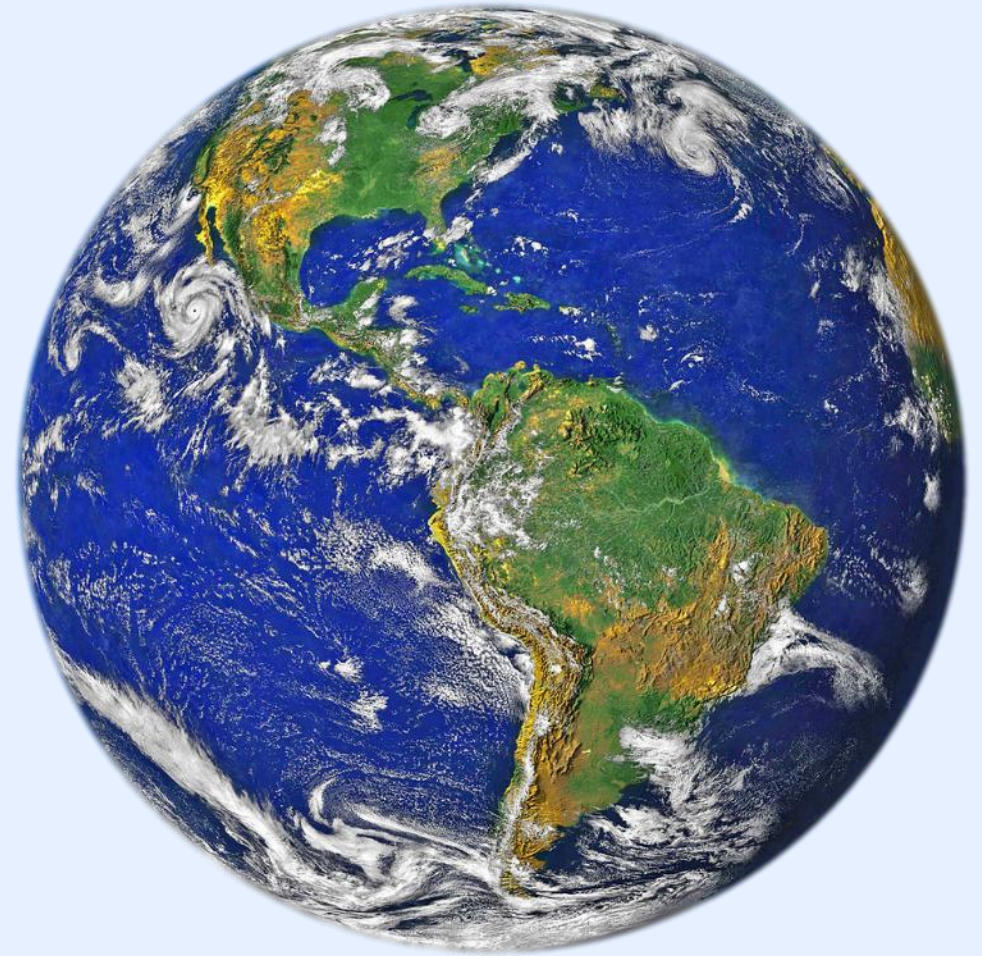


Photo: Pixabay

How to balance expectations for the welfare state with economic sustainability?

Reduce welfare state expenses

- Discussions of benefit offerings and rates, qualification requirements, activity requirements – and degree of active labour market policies
- Increased demand for efficiency. Simplified rules require a break from the trend of increasing complexity

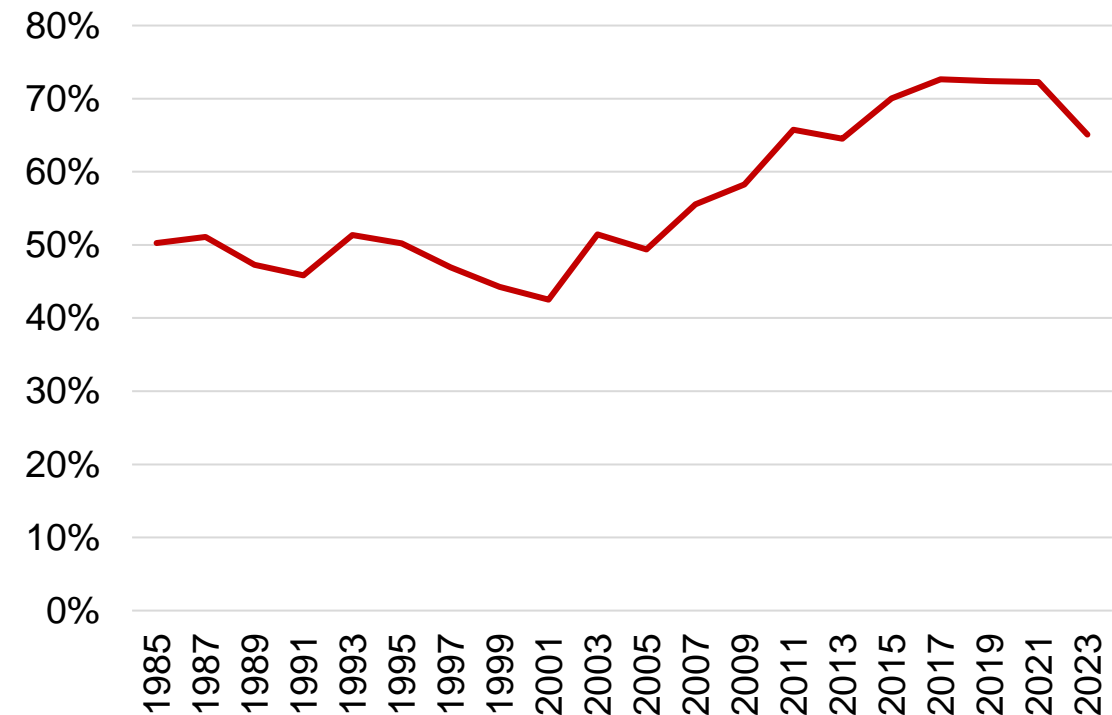
Increase welfare state revenue

- Low willingness to pay taxes could lead to tighter political restrictions

Increase workforce participation

- Increased expectations for follow-up from Nav
- Focus on skills and inclusion

Share of population who support high taxes to preserve important public services



Source: Norsk Monitor
(Ipsos)

Restructuring, skills and inclusion

- More personalised education and lifelong learning, including in combination with work
- Key role for training programmes through Nav
- Measures for increased inclusion and integration of vulnerable groups – continued focus on exclusion among immigrants/refugees and young people
- Increased demand for collaboration between Nav, employers, the educational sector and health services

Preparedness and public safety

- Uncertainty – increased spending on defence and security leads to tough prioritisations
- Increased requirements for preparedness within Nav
- Cyber crime and hybrid warfare are increasing threats
- Benefit fraud and work-related crimes require good collaboration



Photo: Pixabay

Shift in political values

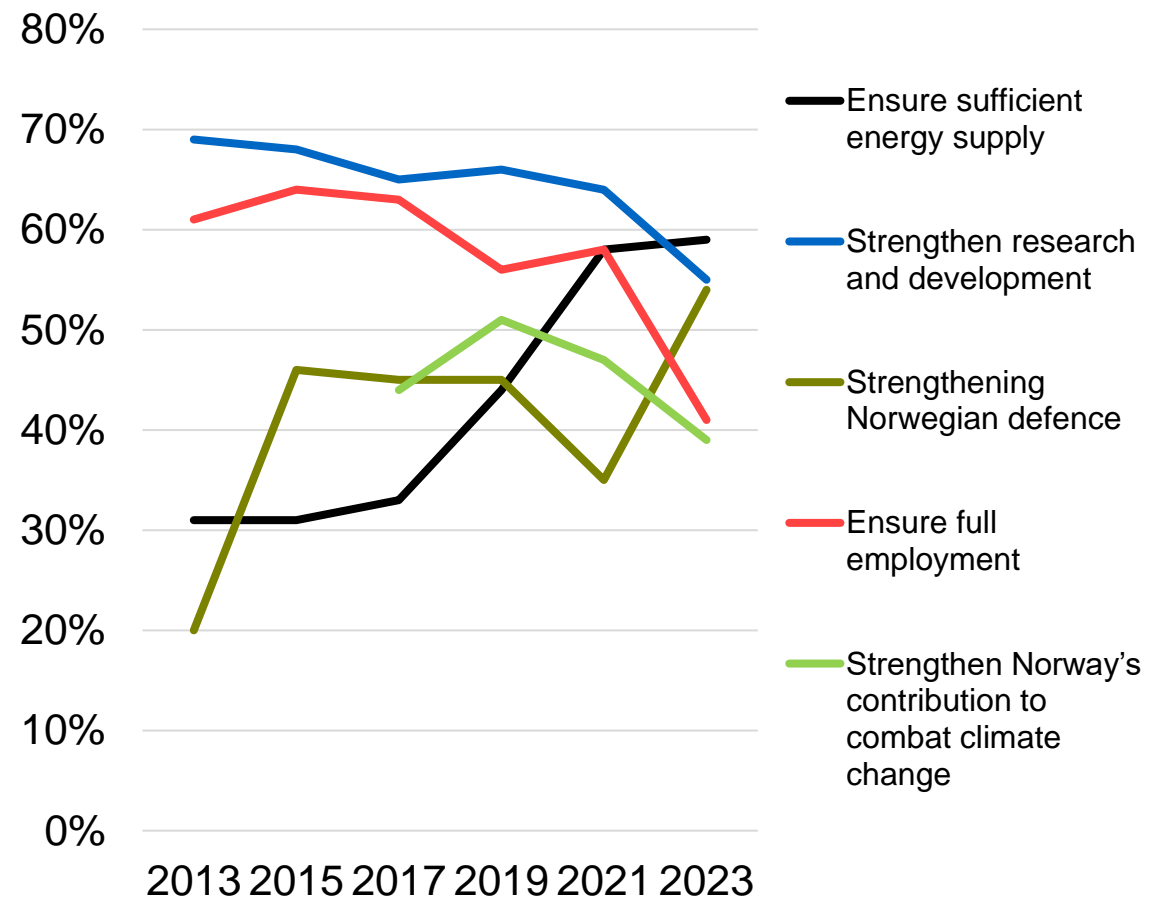
Defence and energy more important
– climate, employment and research
less important

Welfare model under pressure?

- Greater acceptance of social inequality and increasingly positive attitudes toward private solution than before

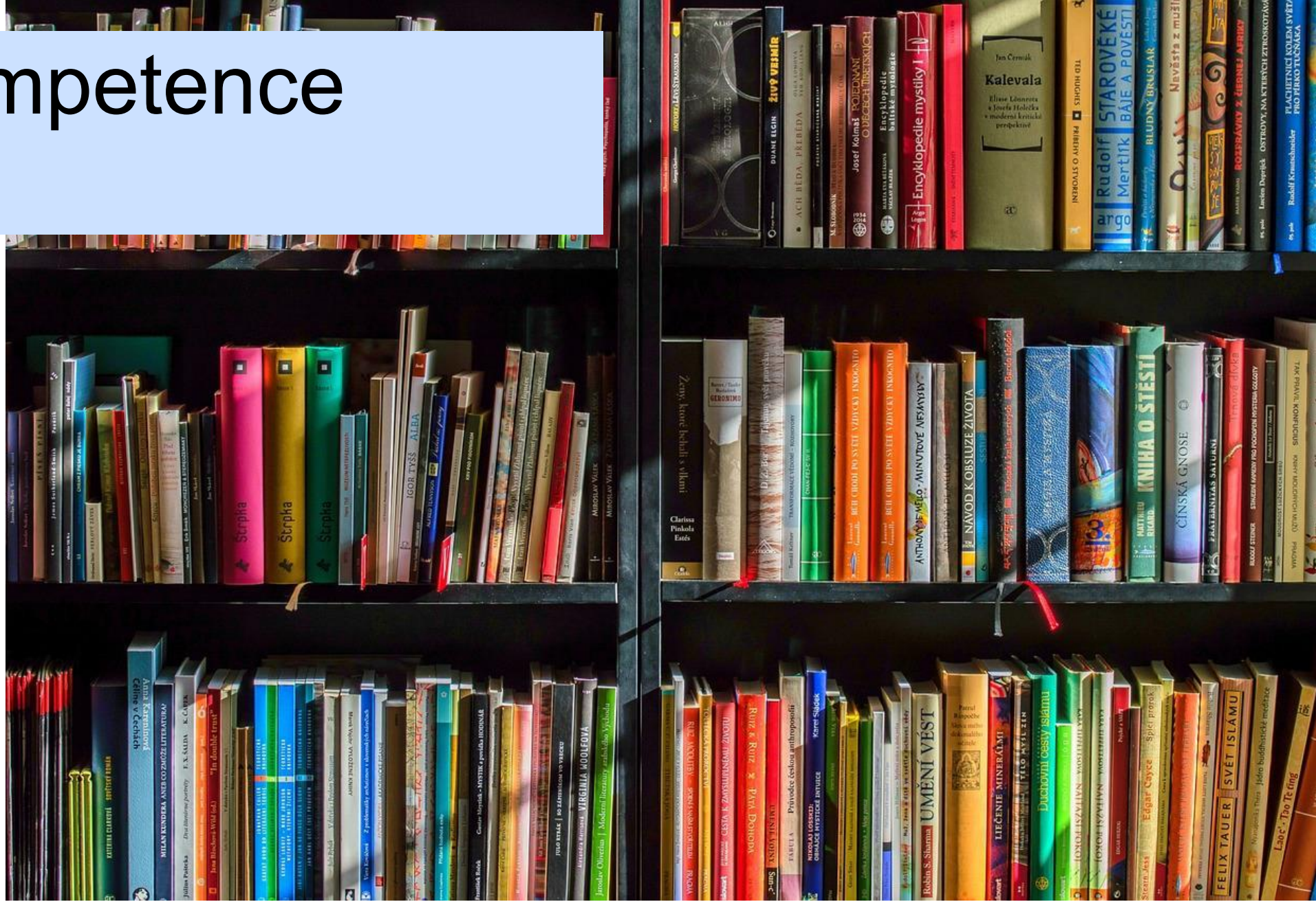
Norway has a high level of trust, but there are signs of change and increasing polarisation

Share of population who believe select issues are especially important



Source: Norsk Monitor (Ipsos)

Nav's competence needs



Future competence needs in Nav

Restructuring and competence gap

- Analytical knowledge of consequences for the labour market and service development
- Practical competence development, exchange of research and experience-based knowledge
- Flexible and innovative service development

Changed user expectations

- Knowledge of user needs
- Overview of employee competence
- Counselling competence and knowledge of how to promote inclusion of vulnerable groups
- Communication and relational competence

More cross-sectoral collaboration

- Knowledge exchange with partners on user needs, service offerings and effects
- Competence in interdisciplinary and cross-sectoral collaboration and joint development initiatives

Digitisation and AI

- Legal, technological and analytical competence
- Competence in use of digital tools in user interactions
- Competence in responsible use of services based on algorithms and artificial intelligence
- Understanding of how digitalisation and AI will affect the labour market

Main findings and conclusion



Societal trends and consequences for Nav toward 2035

Demographics

4/5 of increase in 67+ age group. Decrease in working-age population in half of the country's municipalities

Uncertainty surrounding immigration

Increased demand for efficient and targeted services

25% increase in assistive technology and old age pension requires innovation

Technology

Responsible use of artificial intelligence (AI): Easing workloads, improved language and accessibility, decision support in case processing and follow-up, new tools

Increased digital vulnerability: Benefit fraud, cyber attacks, disinformation

Need for clarification of legal framework, digitisation-friendly regulations and discourse on governance and funding

Labour market

Labour shortages, especially among health personnel and skilled workers

Changes in skill demands due to restructuring and new technology

Protectionism and geopolitical uncertainty leads to unpredictability, but European self-sufficiency also creates opportunities

Good conditions for inclusion. Competence development and lifelong learning in collaboration with employers and the education sector

Living conditions and health

Large influx of refugees leads to increasing demand for social services

Developments in immigration/integration and the economic situation are key factors in the time to come.

Improved public health means fewer people receive health-related benefits

Risk of exclusion during transitions and increased prevalence of mental health problems among young people could bring numbers up.

User expectations

Predictable income protection and long-term plans for inclusion

Cohesive and simple services, personalised to the individual

Expectation gap between efficiency and personalisation – requires systematic interaction between digital services and person-to-person meetings

Political trends

Stronger focus on defence and security leads to tough prioritisations

Increased requirements for security and preparedness within Nav

Sustainable welfare: Stronger focus on competence, inclusion and prevention of exclusion. Discussions about activity requirements, benefit levels, benefit structure and the degree of active labour market policies

High trust and low polarisation in Norway, but some indications this may change



Want to know more?

More information found here: nav.no/omverdensanalyse

You may also contact us via e-mail redaksjon.omverdensanalysen@nav.no