

THE PLATFORMISATION OF WORK IN EUROPE

HIGHLIGHTS
FROM RESEARCH
IN 13 EUROPEAN
COUNTRIES

Ursula Huws, Neil H. Spencer and Matt Coates

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Hertfordshire **UH**

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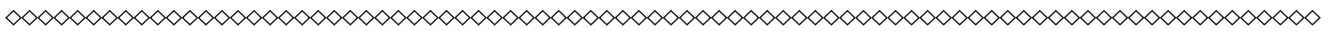
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FOREWORD

When we started this research project in 2016, platform work was still a new phenomenon, and one that many expected to remain limited to the fringes of European labour markets. But after three years of research, we can conclude that platform work has become a way to gain additional income for many workers across Europe. What's more, we actually see platform practices, such as customer ranking of worker performance, spreading across the labour market.

It is clear that platform work is here to stay, and that many involved in this type of work operate outside of existing social protection schemes. Hence, it is high time that our social security systems are updated to reflect this, and the report provides important insights for devising such policies. Crucially, as platform work is intricately linked to a broader trend of precarious and informal work, we need to stop treating platform workers as a separate, distinct type of worker in need of specific policy solutions. Finally, the re-

port provides an important impulse for thinking about ways to harness platform technology for the benefit of workers, our welfare states, and the public good.

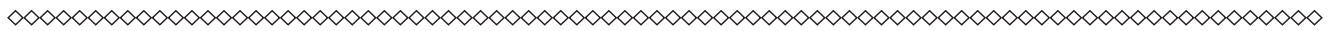
The Foundation for European Progressive Studies (FEPS) has undertaken this research project together with UNI Europa, the University of Hertfordshire and Ipsos MORI. The project also benefited from the financial support of the European Parliament. Several national funding partners also contributed to it, enriching the project with local expertise and ensuring wide dissemination. The report paints a picture of the digitalised labour market, and focuses, in particular on the proportion of the population engaged in crowd work, the income gained through this activity and the crowd workers' employment status.

ACKNOWLEDGEMENTS

We would like to thank our colleagues Justin Nogarede at FEPS as well as Aileen Körfer at UNI Europa for their trust and commitment to this project; and to all national funding partners, whose financial contributions are greatly acknowledged. The crowd working surveys were co-funded by Unionen in Sweden, the TNO Research Institute in the Netherlands, The Chamber of Labour (AK) in Austria, ver.di and IG Metall in Germany, syndicom in Switzerland, the Fondazione EYU in Italy, the Estonian Parliament (Riigikogu) in Estonia, the Kalevi Sorsa Foundation and Service Union United (PAM) in Finland, the Felipe Gonzalez Foundation in Spain, Progresiva in Slovenia, the Masarykova demokratická akademie and the Friedrich-Ebert-Stiftung office in Prague in Czechia, the Trades Union Congress (TUC) in the UK and the Fondation Jean-Jaurès in France.

We also would like to extend our thanks to the entire team of the University of Hertfordshire for the great cooperation and the comprehensive research results.

László Andor, Secretary General, FEPS and Oliver Röthig, Regional Secretary, UNI Europa



INTRODUCTION

Results from online surveys in 13 European countries between 2016 and 2019 reveal two converging trends contributing to a major reshaping of work in Europe.

On the one hand, there is a growing tendency for people to piece together patchwork livelihoods from multiple sources of income while on the other technological change is leading to a growth in the use of digital means for the organisation and management of work, especially in service industries. Platform work sits at the apex of the intersection between these two trends and is the most visible manifestation of larger trends affecting significant proportions of the European workforce. The research was carried out by the University of Hertfordshire funded by FEPS and UNI Europa, with co-funding from a range of national partners.^[1] Fieldwork for the surveys was carried out by Ipsos MORI^[2] who were responsible for data collection only. University of Hertfordshire was responsible for the analysis, reporting and interpretation of the results.

A total of 29,436 working-age adults were interviewed online between January 2016 and May 2019 in the Netherlands (n=2125), Germany (n=2180), Sweden (n=2146), Austria (n=1969), Switzerland (n=2001), Italy (n=2199), Estonia (n=2000), Finland (n=2000), Spain (n=2182), Slovenia (n=2001), Czechia (n=2000), France (n=2159) and the UK. In the UK two surveys were carried out, in January 2016

(n=2238) and April 2019 (n=2235), respectively, in order to measure changes over time.

This report highlights some of the key findings from these studies illustrating these two converging aspects of the restructuring of work in Europe. It looks in particular at two important issues arising from the research: first, the extent to which platform work is an activity carried out as an additional top-up to other forms of employment, rather than constituting a distinctive and separate form of work; and second, the extension of the digital practices associated with online platforms to other sectors. In other words, it focuses on the pervasiveness of ‘platformisation’ as a growing feature of European labour markets. It also examines the relationship between the supply and demand for platform services among Europeans. After presenting the evidence from the surveys, the report goes on to consider some of the implications of this platformisation for public policy. In doing so, it seeks to go beyond demands for addressing the negative aspects of platformisation to explore the positive potential of platform technologies, when integrated with other public policies, for contributing to growth, innovation, the improvement of working conditions and of work-life balance and the development of responsive social services in Europe. A more detailed report of these and other findings from the surveys can be found at <https://www.feps-europe.eu>.

PATCHWORK LIVELIHOODS IN EUROPE

Since the end of World War II, the European standard model of employment – with a full-time permanent job in a recognised profession, social insurance against the risks of unemployment, sickness and disability, recognised rights and benefits laid down in collective agreements or by statute, and a pension on reaching the age of retirement – has maintained a centrally important place in European policy: a reality for many workers and a legitimate aspiration for others. Nevertheless, there have always been some workers who have fallen outside its scope, including seasonal workers (in sectors such as agriculture, tourism and construction) workers on ‘atypical’ or ‘non-standard’ contracts^[3] in other sectors and those working wholly or partially in the

informal economy^[4]. It has also been common for households to supplement their income from wages, benefits or pensions with earnings from other sources, such as taking in lodgers or reselling second-hand goods^[5]. When these supplementary economic activities take place in the cash economy they are difficult to measure. However, the general decline in the use of cash and the growing importance of the Internet in general, and online platforms in particular, in the economic lives of citizens is increasingly bringing them into visibility.

1 The national partners that co-funded the research include Unionen in Sweden, the TNO Research Institute in the Netherlands, The Chamber of Labour (AK) in Austria, ver.di and IG Metall in Germany, syndicom in Switzerland, the Fondazione EYU in Italy, the Estonian Parliament (Riigikogu) in Estonia, the Kalevi Sorsa Foundation and Service Union United (PAM), in Finland, the Felipe Gonzalez Foundation in Spain, Progresiva in Slovenia, the Masarykova demokratická akademie and the Friedrich-Ebert-Stiftung office in Prague in Czechia, the Trades Union Congress (TUC) in the UK and the Fondation Jean-Jaurès in France.
2 Further information on the research can be found at <https://www.feps-europe.eu>
3 See for example Allmender, J., L. Hipp & S. Stuth (2013) *Atypical Employment in Europe 1996-2011*, Berlin: Wissenschaftszentrum Berlin für Sozialforschung.
4 Williams, C. & F. Schnieder (2016) *Measuring the Global Shadow Economy: The Prevalence of Informal Work and Labour*, Cheltenham & Northampton MA: Edward Elgar.
5 Naulin, S. & A. Jourdain (2019) *The Social Meaning of Extra Money: Capitalism and the Commodification of Domestic and Leisure Activities*, London: Palgrave Macmillan.

PARTICIPATION IN THE ONLINE ECONOMY AS A SOURCE OF INCOME

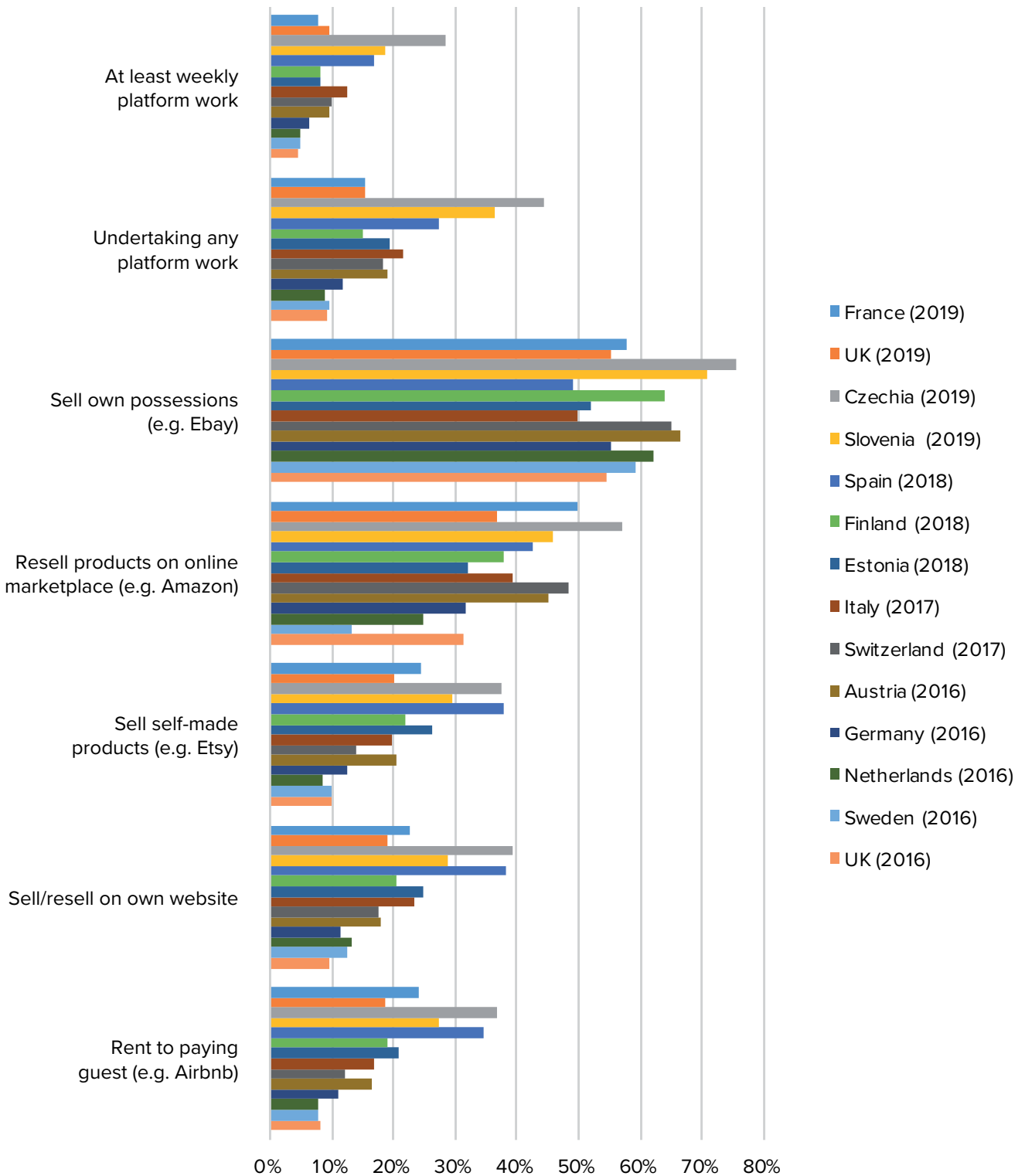
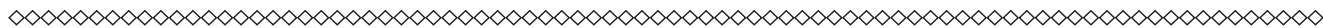


FIGURE 1: SOURCES OF ONLINE INCOME (% OF WORKING-AGE POPULATION)
 [Base: 2159 respondents in France, 2235 in the UK 2019 survey, 2000 in Czechia, 2001 in Slovenia, 2182 in Spain, 2000 in Finland, 2000 in Estonia, 2199 in Italy, 2001 in Switzerland, 1969 in Austria, 2180 in Germany, 2125 in the Netherlands, 2146 in Sweden and 2238 in the UK 2016 survey (weighted).]



As can be seen, Europeans use a variety of online sources to generate income, of which selling their labour via online platforms is only one: one that is less important than selling their possessions online, and, in most countries also less important than selling self-made products or renting out rooms via platforms.

Results from the UK (the only country for which we have trend data) show a significant growth in most of these categories, with an effective doubling in the proportions carrying out platform work at least weekly, selling products on their own websites and selling self-made products. The proportion finding paying guests via platforms like Airbnb increased even more dramatically (from 8.2% to 18.7%) but there was little growth in the proportions selling their own possessions (which may, perhaps, have reached a saturation point at around 54-55% of the population). On the basis of this evidence we cannot be sure whether this growth represents an increase in the numbers of people seeking to supplement their income in these ways or the substitution of online means for more traditional informal, cash-in-hand methods of raising extra money.

With some variations, the geographical pattern is relatively similar for all of these activities, with the highest levels of online income generation in Central and Eastern Europe (Czechia, Slovenia and Estonia) and in Southern Europe (Italy and Spain) and the lowest levels in Northern and Western Europe (France, Germany, Sweden, the Netherlands and the UK). After examining a range of other variables, the most likely explanation for this pattern of national variation appears to be poverty, defined in absolute terms rather than relative to national averages. An analysis by the OECD^[6] of the real value of annual wages in each country measured in US dollars produces a strikingly similar pattern. Estonia (at \$24,300), Czechia (\$25,400), Slovenia (\$34,900), Italy (35,700) and Spain (\$38,500) have significantly lower average wages than Sweden (\$42,400), Finland (\$43,000), the UK (\$43,700), France (£43,800), Germany (\$47,600), Austria (\$50,300), The Netherlands, (\$52,900) and Switzerland (\$62,300). The two countries that do not fit this pattern very well are the Alpine nations of Austria and Switzerland which have higher levels of online income generation than might be expected given their generally high average earnings. Further research will be required to investigate this but it is possible that this apparent discrepancy may be explained by high levels of rurality, with large tourist and agricultural industries making extensive use of casual seasonal labour (with a concomitant need for these seasonal workers to seek alternative forms of income in periods of low demand).

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Platform work in the UK has doubled over the past 3 years, with 1 in 10 working-age adults now carrying out platform work at least once a week.

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According to Eurostat data for 2016^[7], of the countries surveyed, Austria had the highest level of people employed in tourism as a share of those employed in the total non-financial business economy (at 12.7%) followed by Spain (at 12.3%) and Italy (at 10.3%) compared with a European average of 9.4% which might provide some support for this argument. Switzerland, however, has only 9.1% employed in this sector suggesting the need for further investigation.

The growing importance of the Internet as a space in which European citizens buy and sell services can be illustrated by the example of household services. The category ‘household services’ was created by combining three

sub-categories of platform work: ‘occasional, unscheduled work in other people’s homes (e.g. plumbing, repair of appliances, electrical work, carpentry)’; ‘regular, scheduled, work in somebody else’s home (e.g. daily or weekly cleaning, babysitting, gardening)’; and ‘personal service work (e.g. hairdressing, massage, manicure)’ including cleaning services, household repair. As can be seen from Figure 2, the proportion of the adult population purchasing such services ranges from a low of 10% in Germany to a high of 40% in Czechia, while those providing them via online platforms at least weekly ranges from 2.5% (in Sweden and the Netherlands) to 12.1% in Czechia.

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The most likely explanation for high levels of platform work in Central, Eastern and Southern Europe appears to be poverty.

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6 <https://data.oecd.org/earnwage/average-wages.htm>

7 https://ec.europa.eu/eurostat/statistics-explained/index.php/Tourism_industries_-_employment

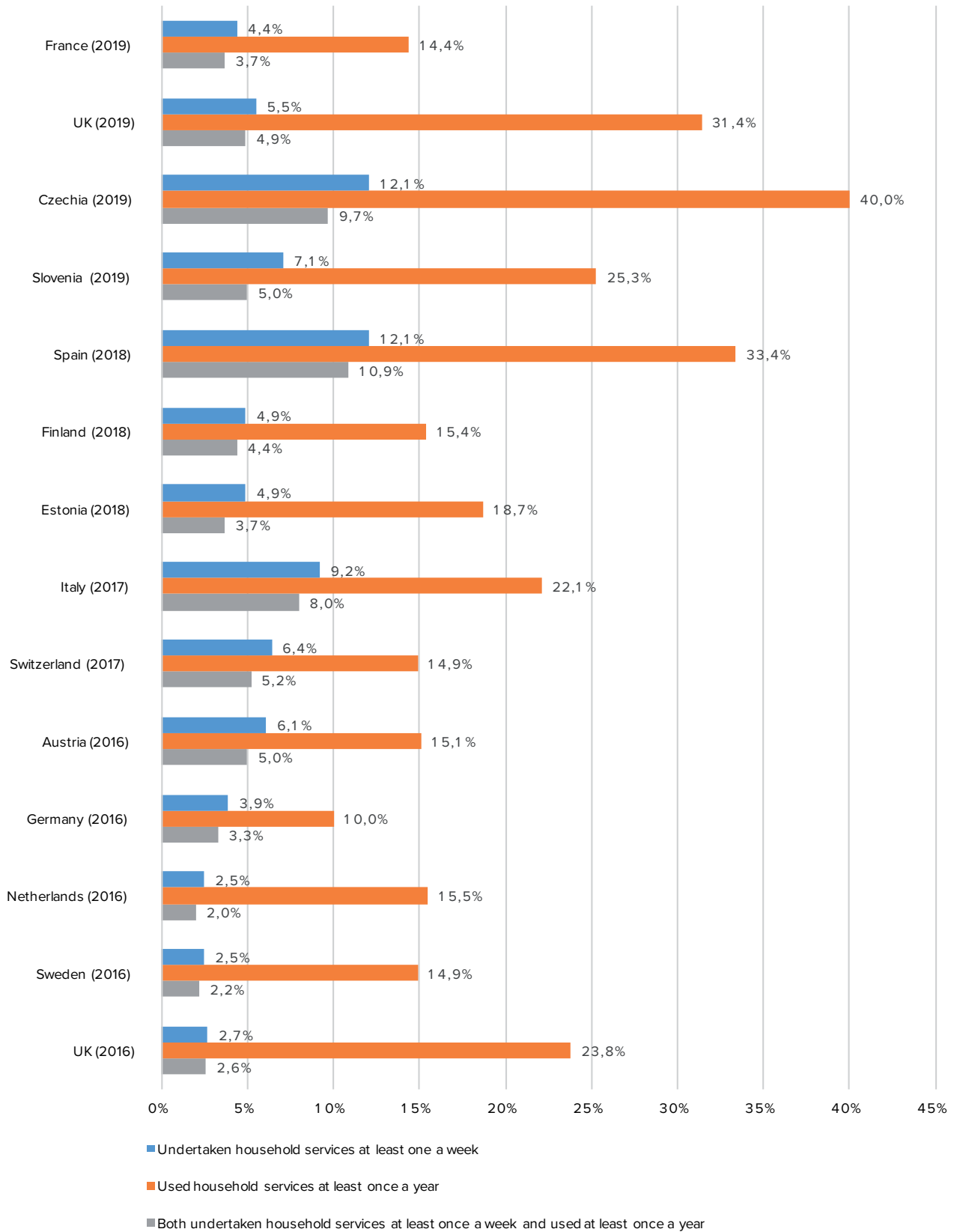
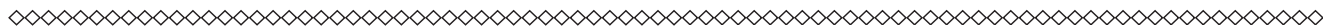


FIGURE 2. UNDERTAKING HOUSEHOLD SERVICES AND FINDING SOMEONE TO DO SUCH WORK AT LEAST ONCE A YEAR (% OF WORKING POPULATION)
 Base: 2159 respondents in France, 2235 in the UK 2019 survey, 2000 in Czechia, 2001 in Slovenia, 2182 in Spain, 2000 in Finland, 2000 in Estonia, 2199 in Italy, 2001 in Switzerland, 1969 in Austria, 2180 in Germany, 2125 in the Netherlands, 2146 in Sweden and 2238 in the UK 2016 survey (weighted).



Trend data from the UK show a clear growth, with the proportion of the population purchasing these services at least once a year rising from 23.8% in 2016 to 31.4% in 2019 and the proportion providing the labour to supply them at least weekly growing from 2.7% to 5.4% over the same period. What is particularly interesting is the very high proportion of those who work in the provision of such services who are also customers from them with 4.9% of the working age population both supplying these services at least weekly and purchasing them at least yearly. On average 83.8% of those providing household services at least weekly are customers for them at least yearly. The picture for the supply and demand for taxi and delivery services is similar, with an average of 90.6% of those providing these services at least weekly via online platforms also purchasing these services at least once a year. This suggests that it is incorrect to view those who provide household services as a sort of servant class supplying the needs of other households. On the contrary, it suggests that to a considerable extent these services are bought and sold among the same population. On the basis of these data alone we cannot be sure whether this growth represents a general expansion in platform provision of household services or a migration online of activities that previously took place in the platform economy. However there is evidence from other sources that it is likely to be the former; for example a UK study that found rapid growth in the demand for household cleaning^[8]. Likely drivers of this growth include an increase in labour market participation by women, lengthening working

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Interestingly, those who provide household services via platforms are not a separate ‘servant class’. These services are often bought and sold among the same population.
 ”

hours and, at least in some Member States, a reduction in the supply of state services to support the care of children, the elderly and the disabled due to public spending cuts associated with austerity.

MOST PLATFORM WORK IS OCCASIONAL

The numbers of people doing platform work at least weekly represent only a small proportion of those who have ever done it, and an even smaller proportion of those who have looked for platform work. As Figure 3 shows, in most countries less than half of those who have searched for platform work have managed to translate it into anything approaching a regular income. The proportion seeking platform work but not finding it ranges from 8.6% in the Netherlands to 21.7% in Czechia. On the basis of this evidence alone we cannot be sure how intensive this search is: does it merely indicate having registered their details on an online platform or a more active pursuit of work opportunities? The trend

evidence from the UK shows that the proportion seeking but not undertaking platform work has increased over the three years from 2016 to 2019 (from 11.7% to 13.0%) though not as much as the increase in weekly platform working (which went up from 4.7% to 9.6% over the same period). The countries with the largest proportions of the population seeking platform work are Czechia, Slovenia, Spain and Estonia, in line with their greater propensity to access other forms of income from online sources and, as we have seen their lower levels of average earnings. In these countries there are also higher levels of weekly and more occasional platform work.

8 See for example Poulter, S. (2016) 'Return of the cleaner: One in three families now pays for domestic help' Daily Mail, 31 March. Accessed on April 15, 2018 from: <http://www.dailymail.co.uk/news/article-3516617/One-three-families-pay-cleaner-35s-drive-trend-hiring-domestic-help.html>

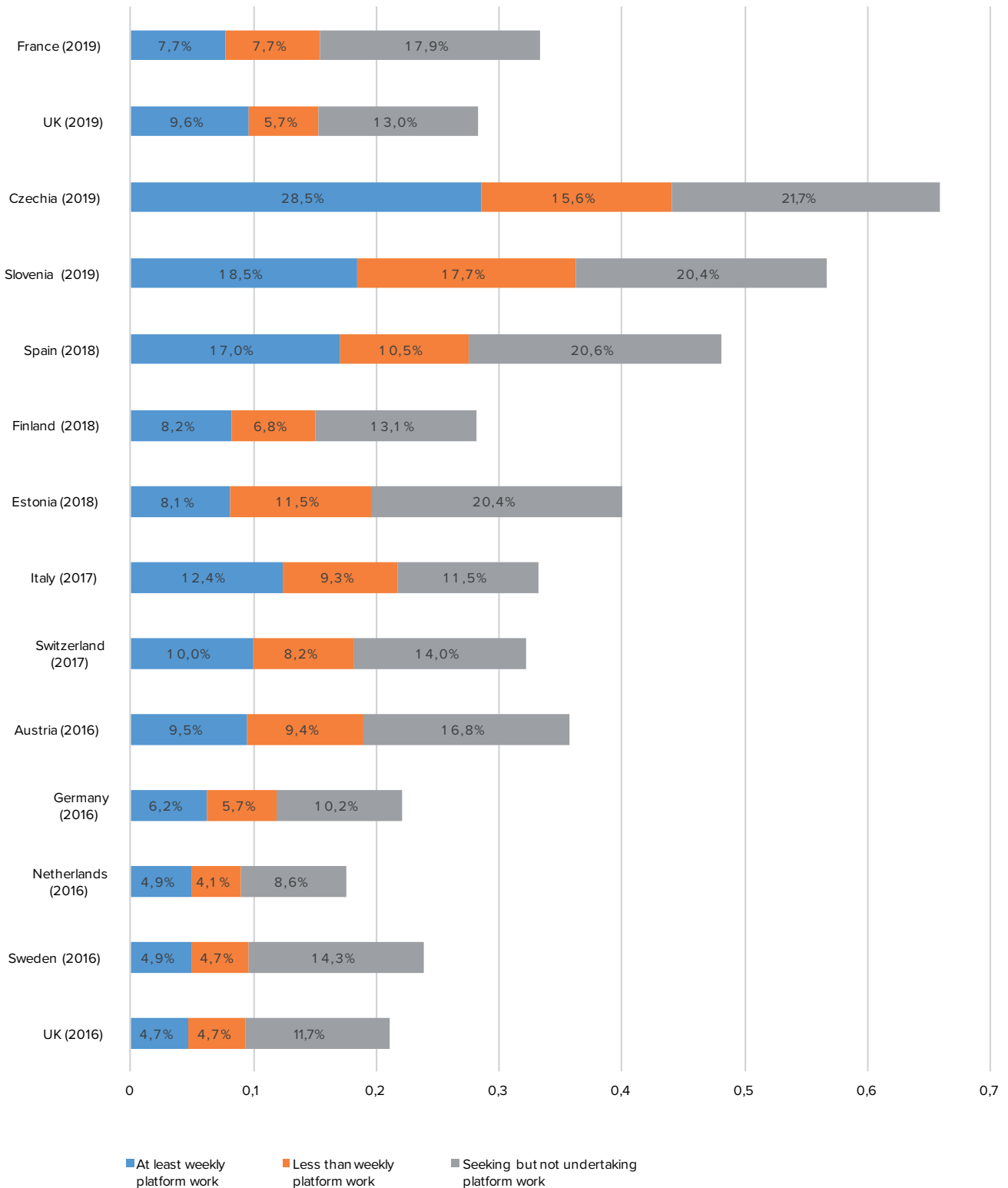


FIGURE 3: SEEKING AND UNDERTAKING PLATFORM WORK (% OF WORKING-AGE POPULATION)

[Base: 2159 respondents in France, 2235 in the UK 2019 survey, 2000 in Czechia, 2001 in Slovenia, 2182 in Spain, 2000 in Finland, 2000 in Estonia, 2199 in Italy, 2001 in Switzerland, 1969 in Austria, 2180 in Germany, 2125 in the Netherlands, 2146 in Sweden and 2238 in the UK 2016 survey (weighted).]



PLATFORM WORK IS GENERALLY A SUPPLEMENT TO OTHER EARNINGS

In the large majority of cases, platform work represents a minor supplement to other earnings rather than the main source of income. As figure 4 shows, it is less than 10% of all income for the largest group of platform workers in all countries, with only a small minority saying that it constitutes all their income. This minority did nevertheless grow in the UK (the only country for which we have comparable data) from 5.2% in 2016 to 9.4% in 2019. Despite this, it must be emphasised that the typical picture is one where the income from platform work is used to top up earnings from other sources. It is therefore impossible to isolate platform workers as a special kind of worker, distinct from others. On the contrary, they are best characterised as part of a continuum of casual, on-call work.

Although there are variations between countries, it is striking that the general pattern is remarkably similar. It might be expected that in some countries (for instance those with high unemployment rates) a large group of what might be termed ‘professional platform workers’ might have emerged, using online platforms as their sole or main source of income and sharply differentiated from the rest of the workforce (it is certainly the impression given by much of the press coverage of the platform economy that there is a pool of ‘gig economy workers’ who are distinctively different from regular workers). These results suggest that this is not the case. In most countries more than nine out of ten platform workers combine it with other sources of income, and the proportion of ‘full-time platform workers’ never exceeds 12% of the total.

This has a number of implications. Not only does it suggest that forms of part-time or temporary work that might otherwise be available to the unemployed are being carried out by people who already have jobs. It also suggest that many workers are having to work very long hours in order to meet their financial needs. This has negative implications for their work-life balance and health. It may also be one of the factors driving a further expansion of platform work if, as discussed earlier, one of the motives driving people to purchase household services in online markets is a lack of time to carry these tasks themselves.

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the vast majority uses platform work to top up income from other sources. Hence, it is misleading to present platform workers as a special kind of worker, distinct from others.

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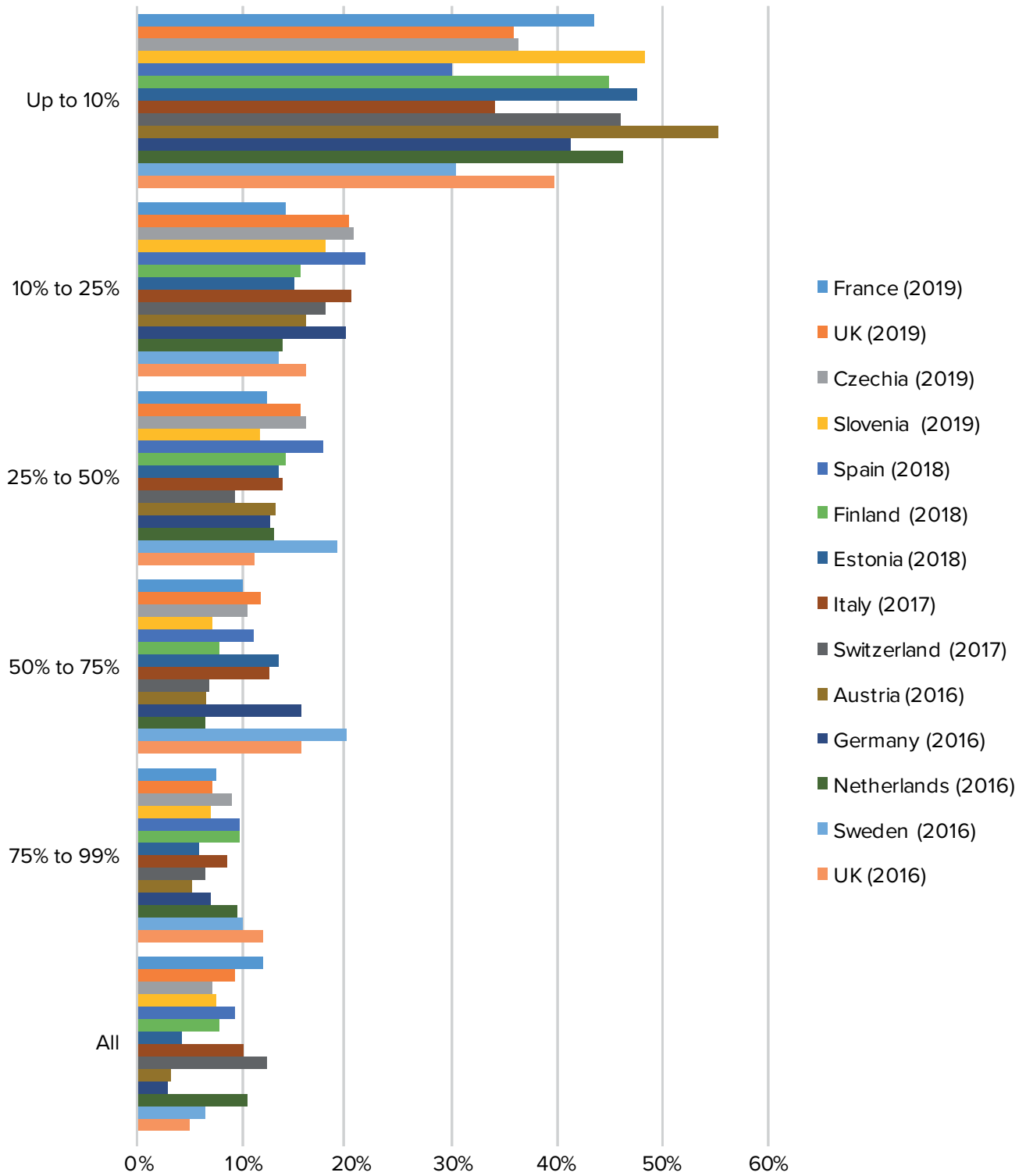
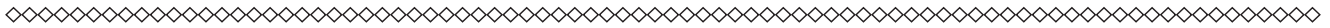


FIGURE 4: PROPORTION OF PLATFORM WORKERS' PERSONAL INCOME DERIVED FROM PLATFORM WORK
 [Base: 241 platform workers who provided this information in France, 288 in the UK 2019 survey, 628 in Czechia, 550 in Slovenia, 495 in Spain, 234 in Finland, 289 in Estonia, 362 in Italy, 284 in Switzerland, 301 in Austria, 223 in Germany, 141 in the Netherlands, 163 in Sweden and 181 in the UK 2016 survey (weighted).]



EMPLOYMENT AND INCOME STATUS

An investigation of the employment and income status of platform workers confirms this picture of platform work as an additional source of income that contributes to building up a sustainable livelihood for which the main earnings come from other sources.

The first group of surveys, carried out in the UK, the Netherlands, Sweden, Germany and Austria in 2016, explored the labour market and employment status of respondents by collecting information from respondents about whether they were employed full-time, employed part-time, self-employed, a full-time parent, retired or a student. They were also asked whether they worked on a temporary contract, had more than one paid job, were in receipt of benefits or pensions or had income from rent or investments. An additional question was added to the surveys carried in 2017-19, in Italy, Switzerland, Estonia, Finland, Spain, Slovenia and France, asking respondents whether they regarded themselves as 'independent contractors' – the status most often claimed for them by the online platforms. Finally, in 2019, the repeat survey in the UK added further questions: did respondents work for an agency? Were they on zero-hours contract? And, if they were self-employed, did they work for a single person or company or for multiple companies? Respondents were able to select multiple responses so the answers total more than 100%.

The responses to these questions are summarised in Figures 5 and 6. These charts show the proportion of the total population in each category with the proportion of weekly platform workers shown in black on the left.

In relation to Figure 6, it should be noted that for the last four categories (agency work, zero hours contracts, self-employment for a single client and self-employment for multiple clients) we only have data from the UK (2019 survey). Data on independent contractor status exists only for Estonia, Finland, Spain, Slovenia, Czechia, the UK and France. Respondents were able to select multiple responses so the answers exceed 100%. The responses summarised in Figure 5, however are based on questions to which respondents had to choose a single response.

As can be seen, platform workers can be found across all different employment and income statuses, with the largest numbers describing themselves as being in full-time employment, reflecting larger national patterns. Particularly high levels of full-time employment in Czechia and Slovenia mirror the relatively low levels of part-time employment in these countries. We may speculate that the high proportions of weekly platform workers saying that they have full-time employee status in these two countries may also reflect the relatively low wages they earn in these jobs, motivating them to seek additional income. This is consistent with the results shown in Figure 5 which show that both of these countries also have above-average levels of people saying they have more than one job.

More strikingly, there is no evidence in Figure 5 that those doing regular platform work are more likely than other workers to regard themselves as self-employed or in part-

time employment, further evidence that being a platform worker does not appear to be a primary identity for most of the people who do this work regularly. Even among those identifying themselves as independent contractors (shown in Figure 6) only a minority were regular platform workers. Results from our qualitative interviews suggest that workers actively seek to conceal the fact that they do platform work at all because they regard it as stigmatising.

Some of the variations shown in Figure 6 also reveal broader national differences, for example the high proportions in France and Finland, and, to a lesser extent the UK reflect the more generous welfare provisions and/or wage subsidies in these countries.

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Those doing regular platform work are no more likely than other workers to regard themselves as self- or part-time employed. For most, it seems being a platform worker is not a primary identity.

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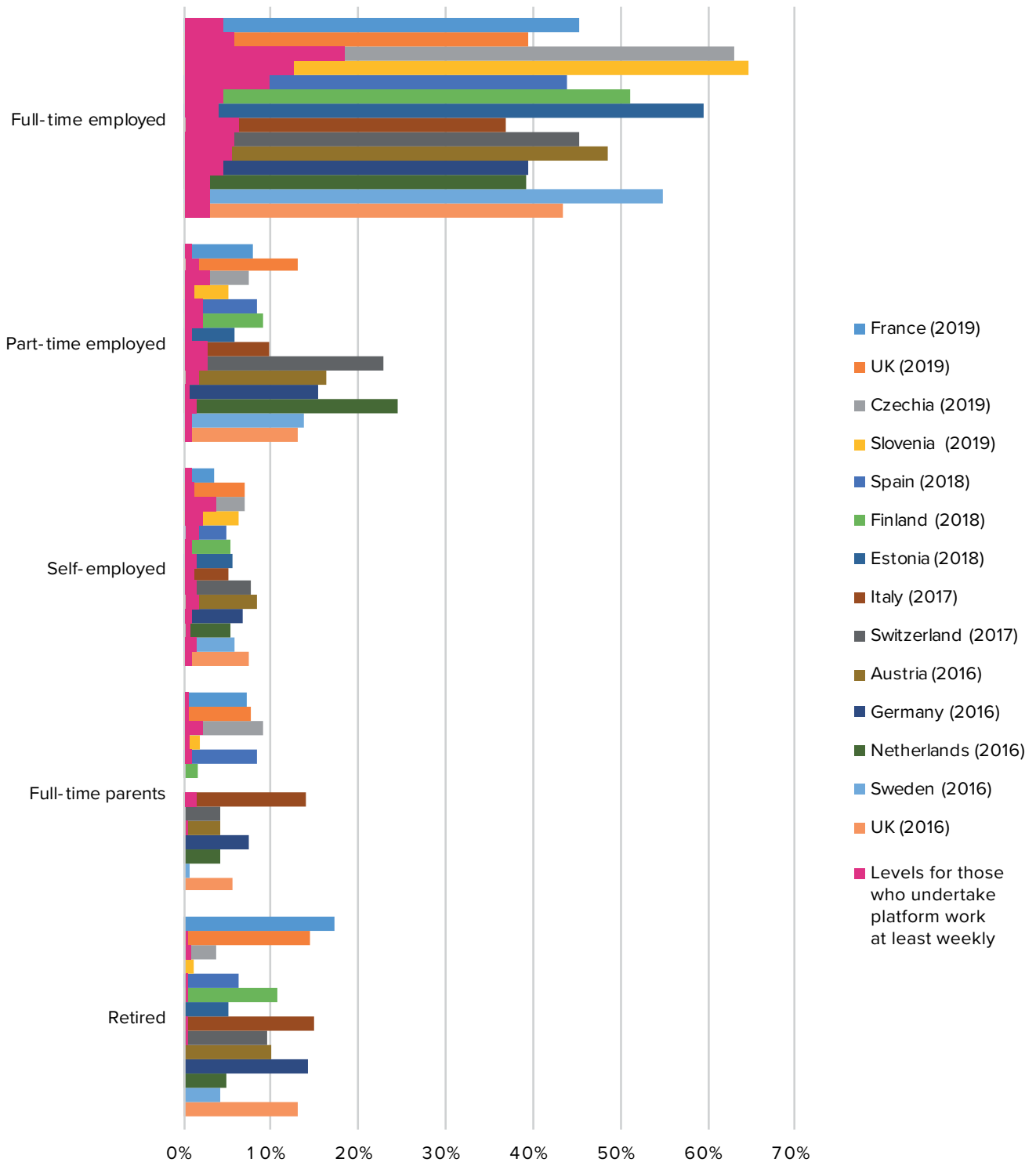
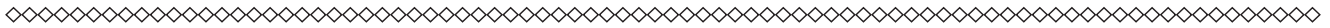


FIGURE 5: EMPLOYMENT STATUS IN WORKING AGE POPULATION

[Base: 2159 respondents in France, 2235 in the UK 2019 survey, 2000 in Czechia, 2001 in Slovenia, 2182 in Spain, 2000 in Finland, 2000 in Estonia, 2199 in Italy, 2001 in Switzerland, 1969 in Austria, 2180 in Germany, 2125 in the Netherlands, 2146 in Sweden and 2238 in the UK 2016 survey (weighted). Full-time parent status not collected in Estonia.]

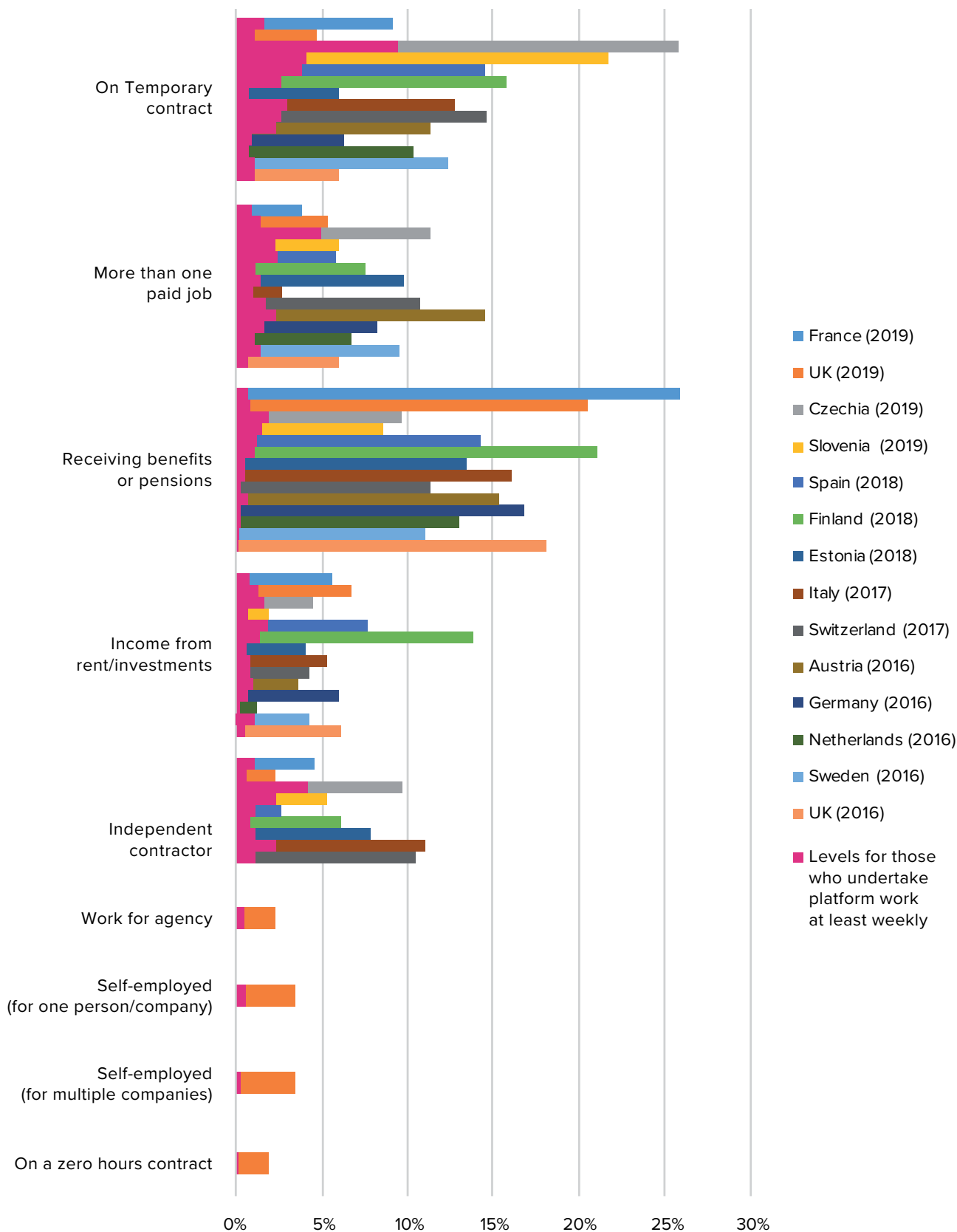
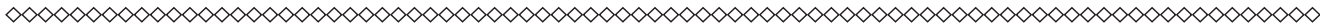


FIGURE 6: FREQUENCY OF TYPES OF INCOME/WORK IN WORKING AGE POPULATION

[Base: 2159 respondents in France, 2235 in the UK 2019 survey, 2000 in Czechia, 2001 in Slovenia, 2182 in Spain, 2000 in Finland, 2000 in Estonia, 2199 in Italy, 2001 in Switzerland, 1969 in Austria, 2180 in Germany, 2125 in the Netherlands, 2146 in Sweden and 2238 in the UK 2016 survey (weighted).]

We must conclude from this overview that most platform work can be regarded as an activity engaged in by people wishing to augment their earnings from other sources. A growing proportion of the population, including many in ‘regular’ employment, is piecing together a livelihood from multiple sources of income, not all of which involve the sale of their labour. Where people are selling their labour, online platforms represent only one of several different sources of paid work.

As such, the growth of platform work must be seen in the context of broader trends. These include: the drop in value of real earnings in Europe in the aftermath of the financial crisis of 2007-8^[9] and, in some countries, the impact of accompanying austerity policies including reductions in benefits and cutbacks in public services; downward pressures on wages and working conditions resulting from increased global competition in the labour market; and a general growth in non-standard forms of employment^[10].

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***A growing proportion
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all of which involve the
sale of their labour’.***
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THE SPREAD OF DIGITAL WORK ORGANISATION AND MANAGEMENT PRACTICES

We have seen that the term ‘platform work’ cannot be used to designate a particular group of workers capable of being demarcated as a distinct group in the labour market. Rather, it is best seen as a practice engaged in by a broad range of workers to add to their income from a large variety of other sources. In several respects it is difficult to distinguish from other forms of casual work that have traditionally been carried out in the informal economy, both in terms of the types of activities involved (cleaning, childcare, delivery, taxi services, household maintenance services) and in terms of the temporary nature of the relationship between the worker and the client for whom the services are provided. We now turn our attention to the digital practices that are generally considered to distinguish online platforms from other types of labour market intermediary, and, indeed, to constitute the novelty that has brought them to public attention since the mid-2010s. Many of these practices are specific to particular platforms. They include the use of proprietary algorithms for matching supply with demand and fine-tuning the monitoring of performance, using the data thus generated to develop increasingly sophisticated performance indicators, and associated incentives and penalties, for the workforce while also enabling ever more precise targeting of advertising towards potential customers. Such practices cannot, of course, be captured in a general population survey. However our surveys did include questions designed to collect information about practices that could serve as indicators for them.

These indicators fall into two broad categories. The first of these categories concerns digital practices that are known

to be widespread in the Internet Age but which, nevertheless, could be regarded as *preconditions* for platform work, which requires workers to be available for remote communication with employers and clients using a digital device such as a smartphone, tablet or computer. That work had been sought or obtained using such devices was built into the definitions of platform work used in our analysis. However we also asked specific questions about whether they were used for work-related remote communication by email or SMS or instant messaging.

The second category of indicators relates to practices generally seen as more specific to platform work. In the first seven surveys (in the UK, Sweden, Netherlands, Germany, Austria, Switzerland and Italy) we asked two questions: the first about the use of apps or websites for notifying workers when a task was waiting for them; and the second about the use of apps or websites to record the work that had been done. In subsequent surveys (in Estonia, Finland, Spain, Slovenia, France and the second UK survey) we asked a further question about the use of customer ratings for the evaluation of the work done.

The responses to these questions are shown in Figures 7-9. Figure 7 shows the broad extent of home-based digital communications with clients or customers across the European labour force. It is at its lowest in Germany, where around a third of the working-age population report sending or receiving work-related emails or digital messages from their homes, and at its highest in Czechia and

9 European Commission Directorate-General for Employment, Social Affairs and Inclusion (2017) *Labour Market and Wage Developments in Europe*. Brussels.
10 Spasova, S., D. Bouget, D. Ghailani & B. Vanhercke (2017) *Access to social protection for people working on non-standard contracts and as self-employed in Europe: A study of national policies*, Brussels: European Commission Directorate General for Social Affairs.



“

Switzerland where over 70% do so. Even in France, where there have been legal measures designed to minimise the intrusion of work into home life since January 2017 (with companies with more than 50 employees prevented from emailing them after 6 pm)^[11], some 44% of the working-age population reported doing so in 2019. In all countries except Czechia and Spain, the numbers of people using this form of teleworking who are *not* platform workers greatly exceeds those who are. In Sweden and the Netherlands, for every platform worker using this practice there are more than six *non*-platform workers doing so. Narrowing the focus down to look only at those who do platform work at least once a week produces an even more overwhelming majority of non-platform workers teleworking in this way

Teleworking from home is widespread across the European labour force. In Sweden and the Netherlands, for every platform worker using this practice there are more than six non-platform workers doing so.

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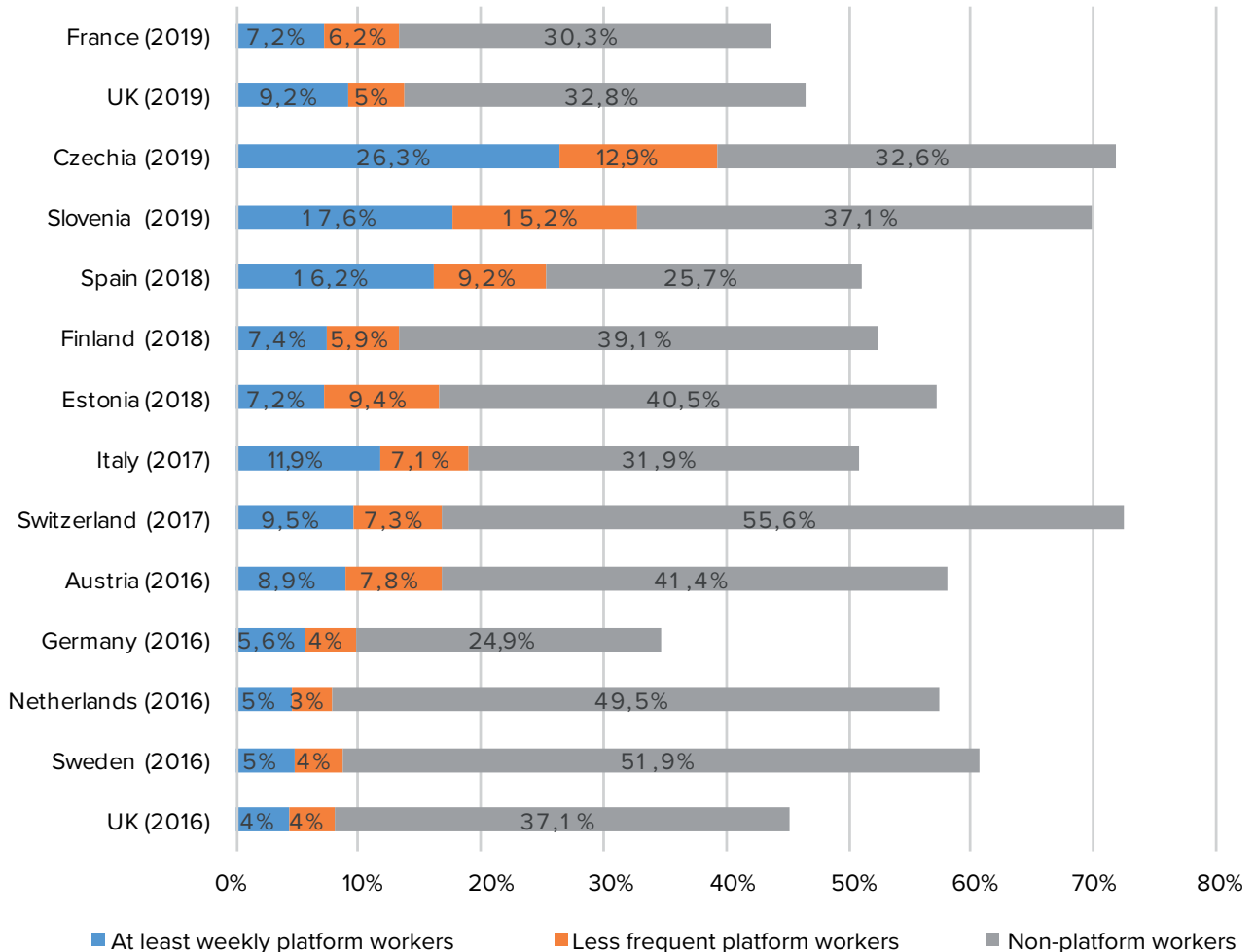


FIGURE 7: SENDING OR RECEIVING EMAILS, TEXTS OR INSTANT MESSAGES FROM EMPLOYER OR CLIENT WHILE AT HOME FOR WORKING AGE POPULATION

[Base: 2159 respondents in France, 2235 in the UK 2019 survey, 2000 in Czechia, 2001 in Slovenia, 2182 in Spain, 2000 in Finland, 2000 in Estonia, 2199 in Italy, 2001 in Switzerland, 1969 in Austria, 2180 in Germany, 2125 in the Netherlands, 2146 in Sweden and 2238 in the UK 2016 survey (weighted).]

11 Agence France Presse (2016) 'French workers win legal right to avoid checking work email out-of-hours', The Guardian, 31 December. Accessed on June 3, 2019 from: <https://www.theguardian.com/money/2016/dec/31/french-workers-win-legal-right-to-avoid-checking-work-email-out-of-hours>

Figure 8 looks at two practices that are more specific to on-line platforms: the use of apps or websites to notify workers of new tasks awaiting them and/or to record their working hours. These practices are newer and do not yet extend so broadly across the labour market. They are at their lowest in Germany (at 13.1%) and exceed 50% only in Slovenia and Czechia. Nevertheless they appear to be growing rapidly, having risen from 15.8% to 27.2% between 2016 and 2019 in the UK (the only country for which we have trend data). Nevertheless, it is striking that here too only a minority of those using these apps or websites are frequent platform workers, and in many countries (France, the UK, Finland, Estonia, Switzerland, the Netherlands and Sweden) even when occasional platform workers are added to those who do so at least weekly, their numbers are still exceeded by *non* platform workers. In other words, it appears that the practices of digital management are spreading much more extensively than the use of online platforms to find work. In the process, growing proportions of the larger workforce

are using digital interfaces to communicate with their managers, suggesting a decline in face-to-face and personal communications with colleagues, employers and clients.

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Digital management practices associated with platform work are spreading rapidly across the larger workforce.
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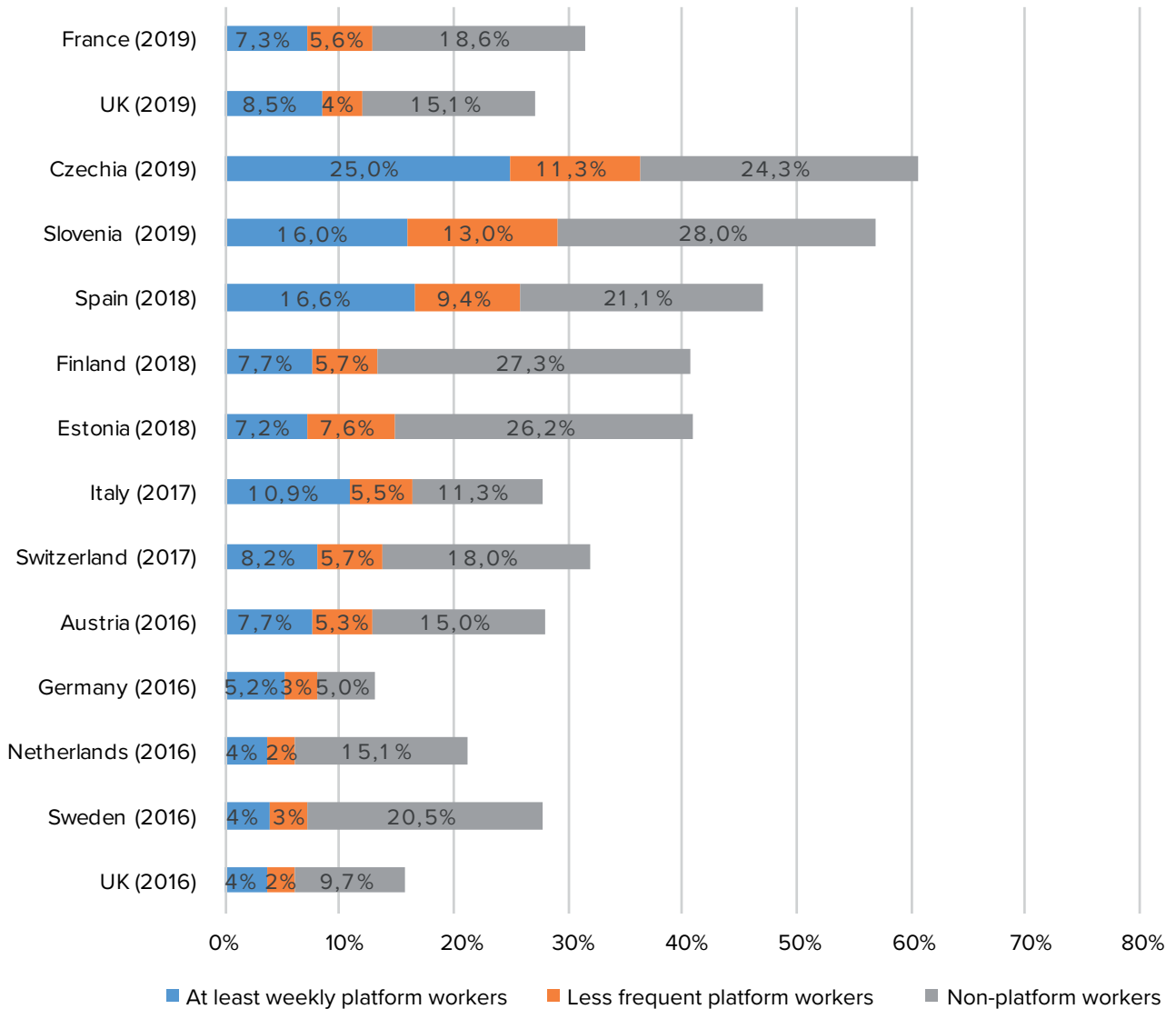


FIGURE 8: USING AN ‘APP’ OR WEBSITE TO BE NOTIFIED WHEN WORK IS AVAILABLE OR TO LOG WORK FOR WORKING AGE POPULATION
 [Base: 2159 respondents in France, 2235 in the UK 2019 survey, 2000 in Czechia, 2001 in Slovenia, 2182 in Spain, 2000 in Finland, 2000 in Estonia, 2199 in Italy, 2001 in Switzerland, 1969 in Austria, 2180 in Germany, 2125 in the Netherlands, 2146 in Sweden and 2238 in the UK 2016 survey (weighted).]



A similar pattern can be seen in the use of customer ratings to assess the quality of work, shown (for six countries) in Figure 9. Although the use of customer ratings as a means of disciplining workers is generally considered as a defining feature of platform work, this too is a practice that extends well beyond the scope of the online platforms. In every country, frequent platform workers are outnumbered by occasional and non-platform workers among those having their work rated in this way and in France, Estonia and Slovenia, there are actually more non-platform workers than platform workers reporting this practice. The growing use of ratings by customers (rather than qualified professionals) for assessing the quality of work has implications both for professional standards and for equity, with research showing evidence of bias in user assessment on the grounds of gender^[12] and ethnicity^[13].

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The growing use of
customer ratings
undermines
professional standards
and is often biased on
the grounds of gender
and ethnicity.
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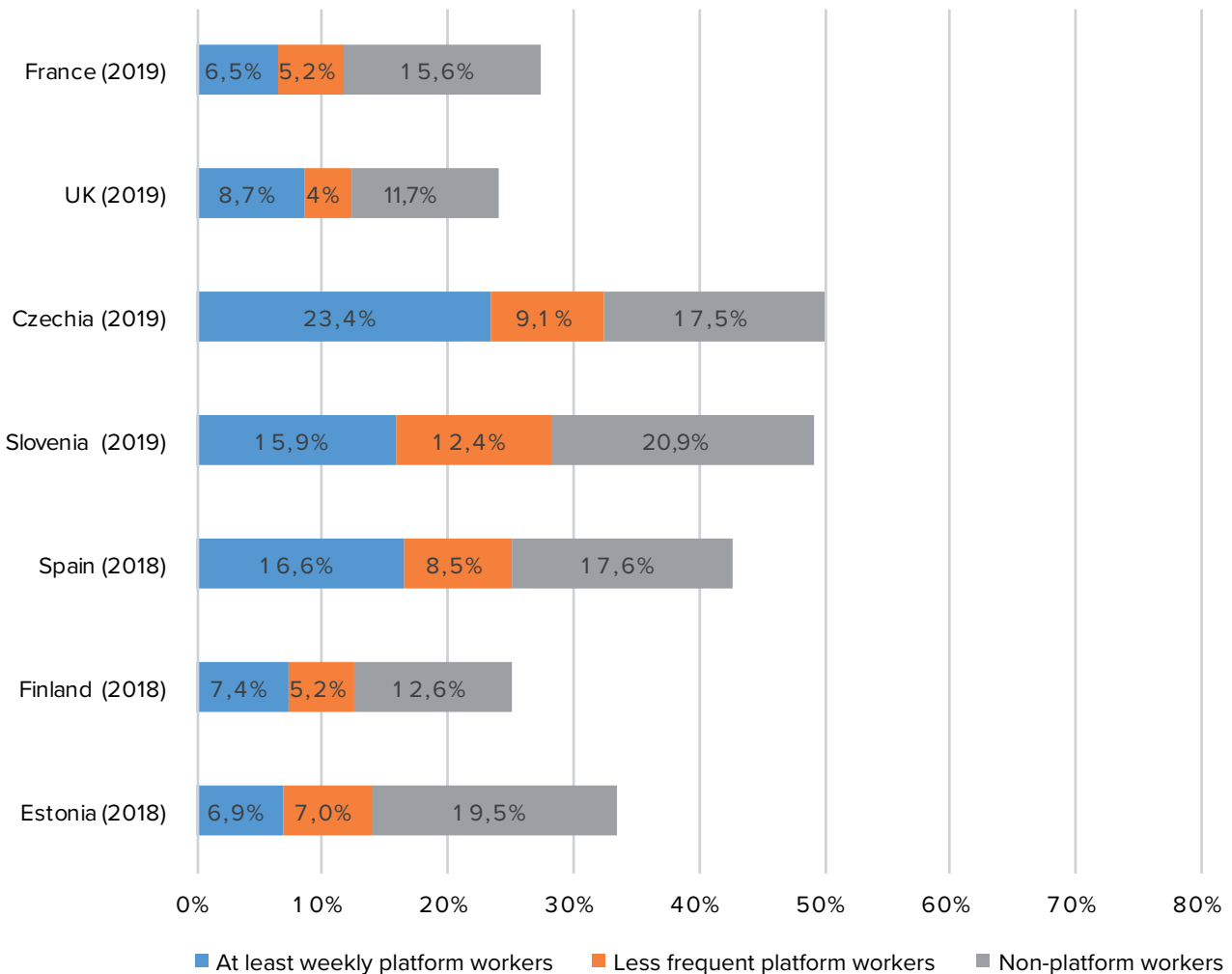


FIGURE 9: HAVE WORK RATED BY CUSTOMERS, CLIENTS OR USERS FOR WORKING AGE POPULATION
 [Base: 2159 respondents in France, 2235 in the UK 2019 survey, 2000 in Czechia, 2001 in Slovenia, 2182 in Spain, 2000 in Finland, 2000 in Estonia (weighted).
 Note: the 2016 surveys did not include a question about customer ratings.]

12 Mitchell, K., & Martin, J. (2018). 'Gender Bias in Student Evaluations', PS: Political Science & Politics, 51(3), 648-652.

13 Rosenblat, A., S. Barocas, K. Levy T. Hwang (2016) 'Discriminating Tastes: Customer Ratings as Vehicles for Bias', Data & Society, October: 1-21.



A GENERAL TREND TOWARDS THE ‘PLATFORMISATION’ OF WORK

This evidence points to a trend towards the digital management of work, which extends well beyond work carried out under the control of online platforms. Indeed, it could be argued that a general ‘platformisation’ of work is taking place across the labour market, of which platform work forms only a small proportion.

POLICY IMPLICATIONS

This report has highlighted two major trends. On the one hand, platform work is a practice mainly engaged in by people with other sources of income, as a supplement to earnings from another job, often a full-time one. This trend may well be associated with an increase in the hours spent working, with negative implications for work-life balance, leading, in turn, to a growth in the demand for buying household services in the market and hence driving further growth in the platform economy. On the other, the digital management practices associated with platform work extend broadly across the labour market and are not restricted only to platform work. Taken together, these findings indicate that it is neither possible nor useful to isolate platform workers as a distinct group on the labour market with problems that could be addressed by regulations that are specific to platform work. On the contrary, the issues

that have been highlighted in research on platform work are broadly pervasive and can only be addressed effectively at a more general level.

These issues fall into two broad categories: issues related to the general spread of casual, precarious on-call work; and issues related to the increasing use of digital management practices across the labour market. To these, we can add a third dimension: the possibilities opened up by these digital management practices for positive uses of platform technologies, both for economic growth and for social benefit.

ISSUES RELATED TO THE SPREAD OF CASUAL WORK

The survey results reported here indicate that the most important factor driving Europeans to take up platform work is the quest for additional income. This suggests that the policy measures most likely to address this trend are those that serve to bolster earnings in the main job.

Addressing the causes

Here, the issue of minimum wages becomes important. In countries where there is no national minimum wage, the existence of a pool of workers prepared to work for low wages on a casual basis undermines the wage levels ne-

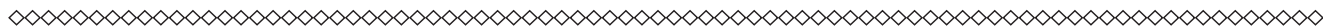
Addressing the consequences

Ambiguity about the contractual status of platform works presents a barrier in this context. A clarification of platform workers’ status as workers would serve not only to determine the applicability of statutory minimum wages but also of other rights, such as rights to paid holidays, to call in safety inspectors, to be represented by trade unions and

gotiated in collective agreements and adds weight to the argument for introducing one. In countries where a national minimum wage exists, then there may be a need either to increase efforts to enforce it, or raise it, or both.

for equal treatment. A clarification of the definition of a dependent worker and the rights associated with this status also needs to be complemented by a clarification of the definition of self-employment, a definition that should be consistent in relation to employment law, taxation and the benefits system.

**“
Most platform workers are driven by a need for additional income. Hence, there is a need for policies to bolster people’s earnings from their main job.
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Making social protection systems compatible with the new labour market realities

Finally, the role of national social protection systems needs to be examined in relation to casual and on-call work. It seems likely that where access to benefits is limited to

those meeting certain criteria for being available to work, some casual workers are vulnerable to falling outside their scope.

ISSUES RELATED TO THE SPREAD OF DIGITAL MANAGEMENT PRACTICES

The general spread of digital management practices across the workforce raises a number of issues potentially affecting all workers. These include the collection of data on workers and customers and the potential for misuse of these data in contravention of the spirit of EU data protection rules.

Other issues to be addressed include the risk of deprofessionalisation associated with a substitution of customer ratings for the professional judgement of qualified supervisors or peers in the assessment of work quality and the

threat to equality of opportunity posed by algorithmic bias.

The increasing use of digital interfaces between workers and their managers, clients and colleagues poses risks to wellbeing at work. A reduction in face-to-face contact may also mean a reduction in informal on-the-job training, a lack of mentorship and a loss of opportunities for dialogue, improvement and social interaction, leading to a range of psycho-social risks that can affect the quality of service to clients as well as the wellbeing of workers.

POTENTIAL POSITIVE USES OF PLATFORM TECHNOLOGIES

Digitally managed online platforms in their current form present risks to workers (in terms of poor working conditions and lack of security). They also pose risks to wellbeing and to work-life balance, not least by adding additional working hours to those already undertaken in the main job. Where customers rely on commercial platform-based services to manage their care responsibilities and household labour there may (in contrast with publicly provided services) also be some barriers to equality of access by users because they are available only to those who can afford to purchase them in the market.

However there is no reason in principle why the technologies on which platform services are based could not be used in ways that contribute to the improvement of working conditions, the development of local economies or to improve the quality of local services, in line with broader European public policies.

For example, the improved matching of supply and demand for services enabled by platform technologies, if developed under the control of municipalities or non-profit bodies, or in the form of public-private partnerships, could be used to develop flexible systems for providing household services on a just-in-time basis, ranging from ready meals for people who are sick, older and housebound to emergency baby-sitting

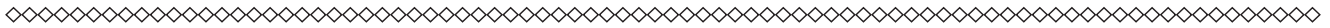
services, transport services for the disabled or care services that are more carefully tailored to individual needs. They could, in other words contribute to the development of digitally managed welfare states fit for the 21st century.

Making household services such as cleaning and maintenance more readily available could also serve to improve work-life balance, by easing the burden of housework which still falls disproportionately on women^[14], thus contributing to gender equality in line with the spirit of the Directive on work-life balance for parents and carers.

It would be possible to avoid the inequalities in access that are inherent in purely market-based services by integrating these platforms with public service provision. It could be useful, for example, to make certain services free to particular categories of users, to introduce means-testing, to apply existing rules on entitlement to public services to platform services, or to provide households with vouchers or a basic income part of which could be used to purchase such services. Placing these platform services wholly or partially under public management would bring them under democratic control, opening up the possibility for local communities to have a say in service prioritisation.

A degree of public control would make it possible to safe-

14 Gershuny, J. (2018) *Gender Symmetry, Gender Convergence and Historical Work-time Invariance in 24 countries*. Oxford: Centre for Time Use Research, University of Oxford.



“

Making household services such as cleaning and maintenance more readily available could also serve to improve work-life balance, by easing the burden of housework which still falls disproportionately on women.

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guard service quality. This could ensure, for example, that all workers are suitable trained, qualified and vetted, that health and safety standards are met and that workers are properly compensated, with employment rights, decent working conditions and entitlements to maternity, paternity and parental leave, sick leave, holidays and pensions.

Such policy initiatives could be complemented by other policy steps to address the social protection, wages and working conditions of platform workers more generally. This would include clarification of their employment rights and a reform of social protection systems to better protect precarious workers in this field, as recommended in the Council Recommendation on access to social protection for workers and the self-employed.

Such initiatives could take advantage of some of the new possibilities opened up by digitalisation, such as the flexibility offered by online platforms for matching supply and demand in real time. This could make it easier to meet the needs of users with unpredictable demands for services, such as people with intermittent medical conditions or workers on on-call contracts, by providing them with just-in-time provision of services (such as emergency baby-sitting or short-term care). It would, further, be possible to combine these platform services with other public goals, such as ensuring that the food delivered is nutritious and ethically or locally sourced.

A local platform strategy could be combined with initiatives to ensure decent working conditions, professional training and employee benefits for the workforce. An integra-

tion with existing care and home help services could be achieved where relevant. Such local platform strategies could, in addition to creating new kinds of decent employment in local communities, bring other forms of benefit to local communities. If the platforms provide market services as well as subsidised ones, then the extra value created by them would be more likely to remain in the local economy, generating a range of multiplier effects. Once platforms are set up, there would be no reason in principle to restrict them to providing household services. They could also be used to create other sorts of employment for local job-seekers, such as, for example supplying business services to local start-ups or SMEs. Consultation with other local stakeholders, including trade unions, would, however, be required to ensure that they were not inadvertently undercutting existing businesses in so doing.

By freeing up time that would otherwise be devoted to housework this could enable both women and men to access the labour market on more equal terms, while improving their work-life balance. On the labour supply side, it could create better-quality and more satisfying employment combining flexibility with security and full inclusion in the labour market, including the legal protections and social rights of employees. Local economies and communities could also benefit in several ways. The value generated by these new economic activities would remain in the local economy; the flexibility offered by digital technology in matching supply and demand in real time would result in better quality services, responsive to the varied needs of local residents; and the improved work-life balance of the local population could release more time for other activities such as creative work, voluntary work or active citizenship.

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A local platform strategy could be combined with initiatives to ensure decent working conditions, professional training and employee benefits for the workforce.

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NOTES

The surveys

The research was funded by the European Foundation for Progressive Studies (FEPS) in collaboration with UNI Europa, with co-funding at national level from Unionen in Sweden, the TNO Research Institute in the Netherlands, The Chamber of Labour (AK) in Austria, ver.di and IG Metall in Germany, syndicom in Switzerland, the Fondazione EYU in Italy, the Estonian Parliament (Riigikogu) in Estonia, the Kalevi Sorsa Foundation and Service Union United (PAM), in Finland, the Felipe Gonzalez Foundation in Spain, Progressiva in Slovenia, the Masarykova demokratická akademie and the Friedrich-Ebert-Stiftung office in Prague in Czechia, the Trades Union Congress (TUC) in the UK and the Fondation Jean-Jaurès in France.

Details of the surveys carried out are given in the table below. Offline surveys have also been carried out in the UK (face to face) and Switzerland (telephone) in order to assess the effect of survey mode on results. Results have been broadly replicated. Investigations indicate that where differences in results exist, these are largely due to inevitable issues in converting an online questionnaire into face to face or telephone mode.

COUNTRY	SAMPLE SIZE	SURVEY DATES	AGE RANGE	STRATIFICATION
UK (online)	2,238	22-26 Jan 2016	16-75	Age, gender, region, social grade, working status
Sweden (online)	2,146	26 Feb-7 Mar 2016	16-65	Age, gender, region and working status
Germany (online)	2,180	1-4 Apr 2016	16-70	Age, gender, region, working status and social grade
Austria (online)	1,969	1-4 Apr 2016	18-65	Age, gender, region, and working status
Netherlands (online)	2,126	22-27 Apr 2016	16-70	Age within gender, economic activity, region, working status
UK (offline – face-to-face)	1,794	24 Mar - 4 Apr 2017	16-75	Age, region, working status and social grade within gender, as well as household tenure and respondent ethnicity using 'rim' weighting procedures
Switzerland (offline – telephone)	1,205	27 Mar - 7 Apr 2017	15-79	Age, gender, region and working status
Italy (online)	2,199	31 Mar- 5 Apr 2017	16-70	Age, gender and region, with data weighted to these same variables, plus working status and economic activity to correct for any sample imbalances.
Switzerland (online)	2,001	3-14 Apr 2017	16-70	Age, gender, region and working status
Estonia (online)	2,000	8 Nov - 10 Dec 2018	18-65	Age, gender, region and working status
Finland (online)	2,000	6-13 Dec 2018	18-65	Age, gender and region
Spain (online)	2,182	27 Nov-5 Dec 2018	16-65	Age within gender, region and working status
Slovenia (online)	2,001	21 Feb-5 Mar 2019	18-55	Age, gender and working status
Czechia (online)	2,000	19-25 Mar 2019	18-55	Age, gender, region and working status
UK (online)	2,235	26 Apr-1 May 2019	16-75	Age, gender, region, social grade and working status
France (online)	2,159	17-21 May 2019	16-75	Age crossed by gender, region and working status

ESTIMATES AND CONFIDENCE INTERVALS

In this report, percentages given are based on weighted calculations to adjust for small deviations of the sample from population characteristics. Missing and “don’t know” responses have been excluded. Where percentages have been expressed as number of people, these figures are similarly weighted. Where counts of respondents (not based on percentages) are reported, these are not weighted.

Confidence intervals have not been given in the main body of the report for ease of readability. The table below gives the maximum deviations that should be add to/subtracted from these figures to form 95% confidence intervals.

BASE ON WHICH PERCENTAGE IS CALCULATED						
Country, Year	All respondents	All male respondents	All female respondents	At least weekly platform workers	At least yearly platform workers	Platform workers giving data on personal income
UK (2016)	2.1%	2.9%	2.9%	9.6%	7.4%	3.7%
Sweden (2016)	2.1%	3.0%	3.0%	9.6%	7.2%	3.9%
Netherlands (2016)	2.1%	3.0%	3.0%	9.6%	7.7%	4.3%
Germany (2016)	2.1%	3.0%	3.0%	8.4%	6.3%	3.4%
Austria (2016)	2.2%	3.1%	3.1%	7.2%	5.4%	2.9%
Switzerland (2017)	2.2%	3.1%	3.1%	6.9%	5.3%	3.0%
Italy (2017)	2.1%	3.0%	3.0%	5.9%	4.7%	2.6%
Estonia (2018)	2.2%	3.2%	3.1%	7.8%	5.4%	3.0%
Finland (2018)	2.2%	3.1%	3.1%	7.7%	6.2%	3.3%
Spain (2018)	2.1%	3.0%	3.0%	5.1%	4.1%	2.3%
Slovenia (2019)	2.2%	3.1%	3.2%	5.1%	3.8%	2.1%
Czechia (2019)	2.2%	3.1%	3.1%	4.1%	3.4%	2.0%
UK (2019)	2.1%	2.9%	2.9%	6.7%	5.4%	2.9%
France (2019)	2.1%	3.0%	3.0%	7.6%	5.7%	3.2%

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