

# Diverse forms of work in the platform economy

September 2022



A powerful  
and balanced  
voice for business





“ *New technologies create vast opportunities for innovation, adaptation and wellbeing for societies across the world. In the world of work, there are significant benefits for workers, consumers, businesses and societies from the emergence of digital platform technologies.*

*This report considers how platform work enables a growing and diverse contingent of workers and entrepreneurs in developing and developed countries, to make a positive impact for new business models that provide them with sources of income, flexibility and purpose; thereby shaping a sustainable steppingstone into the future economy and sustainable labour market participation.*

*The emergence of platform work is part of bigger economic and social transformations that are impacting labour markets across the world. It also follows worker preferences and technological innovation. And it opens up legitimate questions of how we maximize the benefits and manage the risks for workers, citizens and society from this platform opportunity.*

*We do not believe the solution can be found in applying generic global standards across a diversity of platforms and experiences that either intercede with important reforms at the national or local level or more significantly do not in any material respects improve the lived experience. No one-size-fits-all ‘quick fix’ exists.*

*Tripartite and bipartite social dialogue on all levels will need to acknowledge and integrate the diversity of platforms and platform workers and incorporate their variety of needs and traits into similarly diverse frameworks on the national level.*

*This report seeks to place this debate in context. It identifies platform work as a modest but enduring feature of the labour market, and a valuable source of income for those that are sometimes left out of and left behind by the traditional labour market. It also finds that there are promising developments and social innovation in the public and private sector which are helping to shape outcomes.*

*In delivering this Report, we would like to acknowledge the support of Eversheds Sutherlands and IOE members, WEC members and corporate partners, in gathering information on the regulatory and jurisdictional state of the topic in various jurisdictions.*

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## Main Findings & Conclusions

This report outlines the regulatory context, benefits and challenges pertaining to ‘platform work.’ Given the vast diversity of business models, work settings and contractual arrangements for the provision of work and services that encompass platform work, any policy intervention will be complex and needs to be multifaceted and focused on the right regulatory level.

Fundamentally, platform work is one of the many ways of organizing work, which in recent years, enabled by digital technology, has been made available to a wider group of workers. Like any other way of working, platform work is confronted with common questions related to fundamental principles and rights at work, terms and remuneration, occupational safety and health, social security, social dialogue, grievances mechanisms and labour market intermediation.

Platform work also exists within the inherent economic and social inequities we have and continue to witness. This report attempts to place the policy debate on platform work within this context of economic and social trends relating to flexibility and security. In particular, this report highlights the importance of considering the full implications for access to work and income, delivering important and much-needed services, and creating a level playing field for citizens and firms. Following the analysis, this report then seeks to formulate policy recommendations to ensure this new way of doing business and organizing work contributes to the delivery of UN Sustainable Development Goals (SDG) #5: Promoting employment for women, #8: Decent Work and Economic Growth, #9: Igniting innovative business models and #10: Reducing economic inequalities.

Platform work has been and will continue to remain an enduring and powerful force for creating economic opportunities. Reform processes are underway across the areas of common questions above as well as in relation to the challenges around the economic and social context of work in the 21st century - these are being advanced at local and national levels. In pursuing any new reform initiatives, we need to be cautious about prescribing ubiquitous solutions. We should take a focused and nuanced approach to delivering improvements to platform work for workers, communities and economies and avoid introducing false choices with potentially deleterious and unintended consequences.

## Key insights

► **1. Platform work provides valuable services for consumers, especially those in underserved areas and communities, and is an important economic enabler.** In many industries, platform work has led to the expansion of important services creating significant consumer surplus. Research findings from across the world showcase that this new organisation of production and more efficient labour market matching grows, rather than substitutes, overall demand. Micro, small and medium sized enterprises in particular benefit from accessing new and specialized services provided by platform businesses. Businesses of all sizes can more easily access an agile workforce that allows them to service a broader client base, which is more geographically dispersed. Consumers benefit from more and better services and options across the dimensions of time and place.

► **2. Platform work provides an option to workers left out of the traditional labour market as well as offering opportunities for individuals to get income when other supports are not readily available.** Multiple studies have shown that platform work offers valuable opportunities to cohorts and groups of individuals who are traditionally excluded (by design or practice) from labour markets. In some circumstances, as was evidenced through the health and economic crisis of the Covid-19 pandemic, the opportunity for income through platform work was an important and reliable choice for filling employment gaps and augmenting incomes for what might otherwise have been vulnerable workers and as a backstop to governments and societies in navigating mass disruptions. Online work platforms also promote employability by offering work experience, skilling the workforce and maintaining a connection to the workforce for workers in the face of frequent economic disruption, avoiding the generational effects of hysteresis. Platforms also facilitate various training opportunities, skills development, and enhance capacity-building.

► **3. Platform work exists within the broader labour market and is a function of the opportunities and challenges represented by local and national market conditions.** Platform work therefore reflects in part the gaps between the supply and availability of work and demand and opportunity for work in specific labour markets. In considering the role of platform work, it is important to consider the overall nature of challenges in the labour market, including the barriers to work for new entrants and migrants or the ability for those needing to balance work with broader life commitments, such as child- or eldercare. In addition, many of the identified challenges in platform work persist beyond platform work and there are already in place mechanisms and reforms that seek to address

these challenges including existing ILO conventions and recommendations. The policy implications of these broader challenges are overlaid by national, regional and local subtleties as well as existing societal expectations about work. Policy changes need to consider these dynamics while simultaneously recognising that national legal frameworks are also an important forum for dealing with issues related to labour classification.

► **4. Platform work is diverse and heterogeneous. At a high level, it is important to distinguish between online web-based work platforms and location-based platforms amongst a whole range of other categories.** These categories are each a distinct ecosystem within the bigger arena of the platform economy and while some categories have the attention of policymakers in certain arenas, it is unconstructive to make policy landscape generalizations. Within this ecosystem there is vast diversity of types of work offered and undertaken, nature of services, industry sector, and work intermediation, ranging from personal on-site services to digital tasks that can be completed online from the other side of the globe – all of which can impact the applicable rules and regulations. These apply not just to the content but also to sources and levels of regulatory coverage. At the broadest level, there are legitimate distinctions between online web-based work platforms that can operate across multiple countries and where there may be benefit in approaches covering multijurisdictional work compared with location-based work that is specific to the place and time where it is requested and delivered. Given this diversity in the nature of work, the variance between participant and worker circumstances, and the multifarious character of customers, it would be appropriate to take a cautious view on broad-scale policy recommendations and allow national and, as appropriate, state and provincial governments to focus on targeted solutions. This is particularly the case where the context is specific to the time and place in which the work was commissioned, undertaken, and received.

► **5. Despite the complexity of sizing the platform work market and the challenge in comparing platform work with traditional sources of work, it is now widely accepted that platform work is a modest but enduring feature of labour markets.** Detailed analysis in multiple jurisdictions shows that the labour market penetration of platform work appears somewhat limited, especially in context of the much broader market for multi-party, temporary and/or task-based work: estimates by various experts size the rate of online platform work at between 0.2% to 5% of the labour force in developed economies. In addition, the definitions of platform work require some



alignment to how comparisons to work more generally are considered and definitions around inclusion in the labour force. In this regard some markers could be set for properly classifying take up rates, identifying work intensity and defining hours of engagement given the significant variation between hours engaged and/or working across the various types and forms of platform work.

- ▶ **6. An overwhelming number of workers engaged in platform work value its flexibility (to set and adjust their work) and autonomy, and report great satisfaction.** Satisfaction rates tend to be higher than comparable workers in the offline economy and platform workers report requiring significant pay raises to offset any potential limitations on the flexibility that they otherwise enjoy. Moreover, many of these workers have noted that they would want to continue this way of working and would like to do so more frequently. Policy interventions continue to be developed for this new way of working especially in the context of the changing expectations of autonomy.

- ▶ **7. Platform work may promote and contribute to the successful transition of individuals from the informal to the formal economy.** Both online work platforms and location-based platforms have the potential to provide formal infrastructures and systems for the vast number of self-employed workers to engage with businesses and consumers in a more formalized manner. The written agreements, digitisation of transactions and centralized infrastructure, secure payment systems and traceability allow for protections of self-employed workers in environments formerly devoid of these safeguards. Further, there are additional opportunities for financial inclusion and digital literacy by moving traditional services to platforms.

- ▶ **8. Some types of platform work have seen significant social and policy innovation. At the national and sub-national level, in- and outside of traditional tripartite social dialogue, solutions are being developed to enhance positive impacts deriving from the rise of platform work.** Currently, in many countries, protections are connected to an individual's employer rather than the individual. People today more often engage in work through diverse modes and contracts across their working lives and existing safety nets need to align to avoid the crude choice between flexibility and security. In this context, it will be important to consider how social protections can be designed so they are fluid and flexible and can encompass and accommodate new ways of organizing work. Social and policy innovations include tailoring social protections to offer coverage to the entire workforce and integration of new labour market representatives. Key success factors for these social innovations are the involvement of platform workers and platforms and the recognition that regulations need to keep abreast of a more diverse labour market with a focus on more proportional approaches to risk-pooling and portable approaches to accrued entitlements. Platform work challenges traditional social dialogue but also provides opportunities to embrace innovative approaches. Some platform workers are collaborating to better organize and represent their interests. In some cases, association occurs through traditional workers' and business' organizations, while others are independent from them. Innovative solutions are emerging within this new way of working, which has promoted conducive and sustainable workplace relations, social dialogue, and stable industrial relations. As these innovations emerge at the national and sub-national level (rather than in broad-based global standards), we're seeing a wider range of solutions materialize that better serve workers across their different local contexts.



## Platform work offers significant economic value, and was critical in mitigating the damages caused by Covid-19

### The platform economy has delivered significant economic value globally by improving labour market efficiency, access to services, and expanding consumer and merchant choices

Platforms can support business growth through improving the efficiency of labour market matching and enabling them to meet demand faster and with greater flexibility. Smart digital technologies amplify these efficiency gains and will become more important as operating within more volatile environments and markets becomes the business norm. The ability to easily adjust business-cases, operating models and workforce permutations concomitantly is critical for sustainable growth. As such, the employment and employability of all workers is increasingly dependent on the availability of an on- and offline contingent pool of appropriately talented workforce. This economic benefit has been demonstrated globally, with numerous pieces of research highlighting the substantive value-add of platform work.

McKinsey has highlighted the potential of online talent platforms to increase productivity and provide new jobs. In 2015, they projected that online talent platforms would add \$2.7 trillion (or 2%) to the global economy and increase employment by 72 million FTEs by 2025.<sup>1</sup> Public First's Good Work Report in 2021 found that the gig economy in the UK makes up around £25bn in Gross Value Added, which is just over 1% of the economy.<sup>2</sup> They forecast it could contribute an additional £4.7bn in economic growth, raising incomes for average families, increasing convenience and affordability for consumers, and generating extra tax revenues for the public service by increasing the size of the economy.<sup>3</sup>

Platforms allow for businesses to more quickly meet their labour demands to grow and adapt their businesses, improving business growth and labour market efficiency. Several studies confirm that better matching of workers to businesses has a clear impact on economic growth. Surveys of SMEs by the OECD highlight that remote hiring is less expensive, allowing SMEs to complete work faster and mitigate challenges with finding talent locally.

A Brookings Institution study from 2022 found that 93% of America's population has access to rapidly delivered fresh groceries or prepared foods through at least one delivery platform.<sup>4</sup> These delivery zones reach most Americans living in traditionally defined "food deserts" with 90% of people living in low-income, low-access tracts having at least one digital food access option—and the service rate exceeds 95% in food deserts within metropolitan areas.<sup>5</sup> Deloitte's Delivering Growth report assessed the impact on restaurants in 2019 as they engaged with delivery platforms to grow their consumer base in several European capitals.<sup>6</sup> For many restaurants, the costs of setting up delivery of their menus themselves wouldn't be feasible; and many didn't offer a delivery service. Restaurants that started using delivery platforms saw an overall rise in demand for their meals. The report finds the availability of delivery platforms fueled the growth of new restaurants. Moreover, these delivered meals did not replace on-site reservation and this increased the revenues and meals sold, especially in non-chain restaurants. Comparable results from Australia and New Zealand in 2020 underscore these positive economic impacts. In Australia, spending on meal deliveries has increased between 2012 and 2019 leading to a \$2 billion increase in restaurant turnover over that period. The increased

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1 McKinsey Global Institute. (2021). The future of work after Covid-19. McKinsey Global Institute.

2 Public First. (2021). Good Work Report. Public First.

3 Public First (2021). Good Work Report. Public First.

4 Brookings Institution. (2022). Delivering to Deserts: New data reveals the geography of digital access to food in the US. Brookings Institution.

5 Brookings Institution. (2022). Delivery to Deserts.

6 Deloitte. (2019). Delivering Growth The impact of third-party platform ordering on restaurants. London: Deloitte.

spending has not cannibalized restaurant reservations; rather it has increased the number of meals consumed and the wallet share spent on meals.<sup>7</sup>

There is also considerable evidence that the platform economy also enables those with less capital to get access to assets or services that are necessary to engage in the economy. A 2022 study found that individuals without cars or access to cars are more likely to use ride-hail, and use it more often, compared with people with cars, particularly to fill spatial and temporal gaps in public transit service and to access medical care and groceries.<sup>8</sup>

Interviews in Kenya, Ghana and Indonesia highlight the particular importance of delivery platforms to Small and Medium Sized Enterprises.<sup>9</sup> As more and more of these SMEs engage in e-commerce on retail platforms for the sale of their goods, delivery platforms help them expand their clientele base. Moreover, the platform services enable them to focus on production of their product and service rather than on the distribution and delivery logistics.

### **During the Covid-19 pandemic, platform work played a key role mitigating the damages for vulnerable workers**

Platform work has enabled workers to more effectively smooth income and consumption in response to economic shocks to the labour market, such as unemployment. As economies were impacted by the Covid-19 pandemic, platform work became critically important to mitigate economic and labour market disruptions. To contain the spread of the virus, delivery of groceries, meals, medicines, and other household needs became of vital importance to many. At the same time, platform work was vital in supporting a vast amount of displaced workers' transition to new work, often in essential sectors of the economy.

Analyzing administrative data and a representative survey of thousands of drivers and couriers across the United States, United Kingdom, Brasil, France, Canada and Australia who started working with Uber during the first year of the pandemic, Accenture found that platform work supported people to mitigate the financial and health impact of the pandemic, with 79% of new workers reporting that platform work acted as a financial safety net.<sup>10</sup> According to a UC Davis study, during the ongoing pandemic, lower-income areas saw less of a reduction of trips than higher income areas, suggesting that ride-hailing services played a vital role in meeting their mobility needs.<sup>11</sup>

During the pandemic, employment agencies were confronted with unprecedented demand from vital sectors to find workers. At the same time, large numbers of displaced workers from adversely impacted sectors contacted agencies for new job openings. As the World Employment Confederation (WEC) has noted, through a variety of initiatives workers from displaced sectors were re-skilled to be assigned to essential sectors and jobs. Often these initiatives were deployed in close partnership with trade unions and/or public employment services.

Beyond integrating vast numbers of displaced workers, platforms provided valuable essential services and protection for their workers. Analyzing (survey) data from delivery and ride-hailing platforms, the OECD found in 2021 that platforms provided personal protective equipment (PPE) to workers and/or afforded some form of sickness pay to enable self-isolation without the loss of income.<sup>12</sup> Platform work will form an enduring part of the economy beyond the pandemic. The user growth in digital platforms during the pandemic will continue beyond Covid-19.

7 AlphaBeta. (2022). Growing the Pie: Delivery apps bring \$2.6 billion of trade to the Australian restaurant industry, of which 70% is incremental, February 2020.

8 Browen, et al. (2022). Buying access one trip at a time: Lower-income households and ride-hail. Journal of American Planning Association.

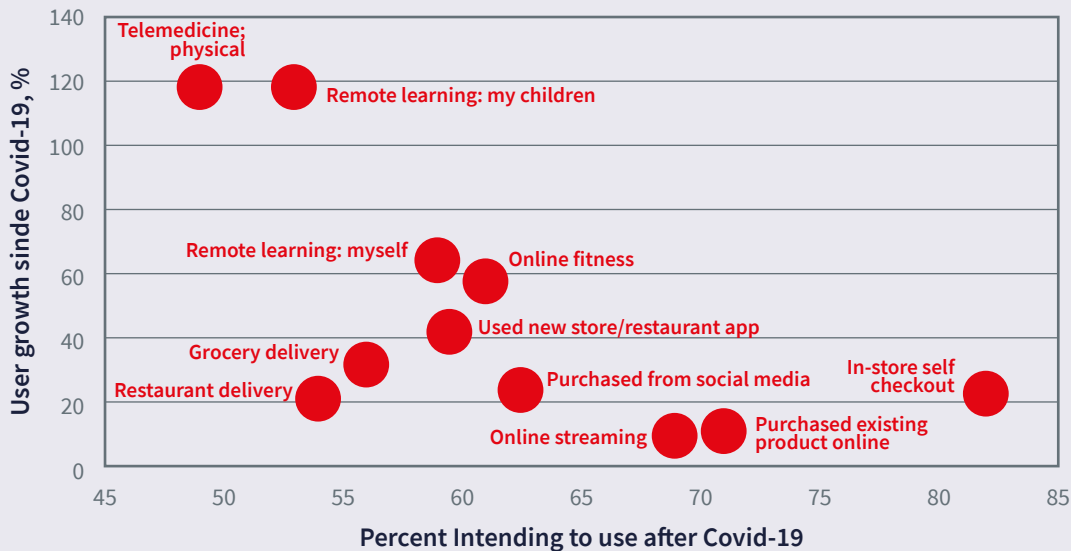
9 ILO. (2021). *World Economic and Social Outlook 2021: The role of digital platforms in transforming the world of work*. Geneva: International Labour Office.

10 Accenture. (2021). *Platforms Work Report Research with workers using the Uber app during the first year of the Covid-19 pandemic*. Accenture.

11 UC Davis. (2021). Ridehailing demand is resilient among low-income travelers during the Covid-19 pandemic. National Center for Sustainable Transportation.

12 OECD. (2021). *What have platforms done to protect workers during the coronavirus (Covid 19) crisis?* Paris: OECD Publishing.

Figure 01 ► Increase in use of consumers of digital channels since Covid-19 began in China, France, Germany, India, Japan, Spain, United Kingdom and United States



## Platform work is challenging to define as it has multiple manifestations, and comprises a complex, heterogeneous ecosystem of businesses and activities

The platform economy is a diverse ecosystem. It spans multiple sectors of the economy, business models, service provision modalities, ways of working, and a wide divergence of worker profiles. Indeed, this diversity only to a limited degree can be neatly categorized in fixed and mutually exclusive and pre-existing sectoral boxes. They need to be perceived as intersecting on several continuums of different services provided to the workers and clients they seek to engage and the nature of work from ranging from personal on-site services to digital tasks.

Platforms connect users in a broad spectrum of ways – including peer to peer (P2P), business to business (B2B) or between businesses and individuals (B2P) formats. These features are a function of the user experience but also, and importantly, the nature of industry and services being offered as well as the existing quality and quantity of services in that industry. In this regard, the provision of services in unsociable times, underserved areas or where there is low demand are examples.

It is important to recognise that the way to ensure that workers are protected from the risks of work while continuing to access the opportunities is to focus on the effect on workers rather than an emphasis on regulating based on particular business models. Governments must be able to distinguish between de facto agencies and intermediaries and their arrangements - and should do so in the context of work undertaken and the workers engaged. In addition, this contextual analysis can also guide the appropriate level of political and regulatory intervention – local, national, or global. For instance, services in the physical world have different implications to digital tasks because they have an implied effect on other issues that are subject to local or national regulatory coverage.

The connections in platform work facilitate diverse types of work, which include location-based platforms that require the workers involved to be located in a given territory (delivery, transport, care), or online web-based platforms, where workers have significant flexibility in their working

location online (consultancy, software design, image review for social networks). The former is a visible and localisable workforce with personal on-site services; the latter is an invisible workforce dispersed around the world focused on digital tasks.

This division between location-based platform work and online web-based work is an important feature for any analysis of work in the platform economy. The ways of working, professional profiles of the workers, perception of the work and regulatory considerations can vary significantly between them. Accordingly, when addressing the needs of platform workers, it is important to account for these differences.

As the online work platforms develop their business models, some of them can increasingly be perceived to act as employment agencies (or temporary work agencies) with an online interface. Web-based platforms allow firms to focus on their core activities and outsource tasks to more specialized partners. In particular, web-based platforms allow firms of all sizes to easily and cheaply access high value IT services and support. It is important to note that there are different skills required of online platform workers and location based workers.

The major platforms include *location-based platforms* such as:

- ▶ **Ride-hailing services** such as Didi, Uber and Lyft;
- ▶ **Delivery services** such as Glovo, Deliveroo, TakeAway.com, and The Delivery Hero;
- ▶ **Personal services** such as Helpling, Task Rabbit, Handy, and Care.com

*Web-based platforms* such as:

- ▶ **Microtask/crowd work** platforms such as Mechanical Turk, Clickworker, Gigwalk, Onespace, Crowdsourcing, and FigureEight;
- ▶ **Talent services** such as Randstad, Upwork, MBO Partners, Toptal, The Adecco Group, Catalant, Fiverr, Freelance.com, Zhubajie, Hays, Twago, LiveOPs, TalentNet, Manpowergroup and Adia.

There are also multiple profiles for the types of workers that engage in the platform economy. There are several taxonomies and phenotypes for workers in the platform economy as well as various observations of the motivations of workers in the platform economy. Broadly these have sought to categorize workers on a spectrum based on choice and necessity of engagement; whether income sought is primary or supplementary; and where the motivation for engagement is growth or as a bridge between jobs. Solving for these diverse motivations is a complex exercise in any event but the difficulty is further elevated because workers frequently move (and are able to move) between platform and non-platform work. In addition to the multiple profiles of workers, there are almost as many business models as platforms that impact on the type of work provided and the working conditions of the workers. These different models can play a role on the type of regulations that are applicable or not to platforms.

These distinctions and differentiations are important to comprehend in any analysis and policy prescriptions pertaining to the issue of platform work. Equally, these variations may also generate similar or identical effects as challenges when dealing with non-platform work. Hence, identifying the underlying cause and how it may already be addressed in existing instruments and arrangements may also provide a more effective response.

## Platform economy employs a relatively small proportion of the global labour force

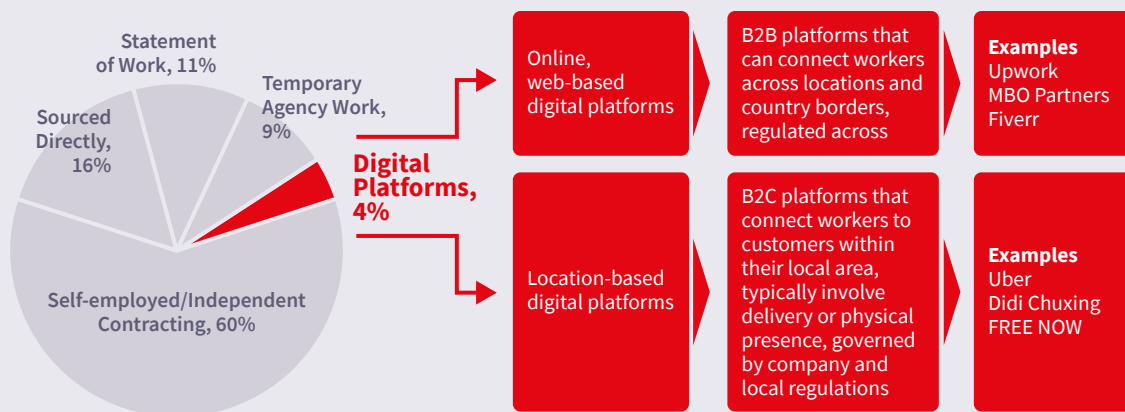
The platform economy is often cited as being a large and/or growing feature of the labour market, with an Australian state Government's Inquiry into On-Demand Work (2019) suggesting that 14% of

the labour market engaged in a form of platform work<sup>13</sup> and research by Staffing Industry Analysts (2016) suggesting that 29% of the entire US workforce alone had participated in some form of platform work.<sup>14</sup> Nearly all of these estimates largely misrepresent the true size of the platform economy due to not applying comparable tests for labour market and workforce participation, overly broad definitions of businesses that are included, inconsistent approaches to what constitutes ‘work’ and the focus on take-up rather than the more important factor of work intensity. Comparing workers engaged in platform work and workers in employed roles do not refer to equivalent or even broadly similar categories. Understanding intensity of work is critical in evaluating how many people actively use platforms as their main form of work. To make matters more complex, defining how to fully define and measure platform work remains a challenge partly due to relatively low entry and exit barriers, as well as the opportunity to multi-app and also engage in both traditional employment and platform work simultaneously.

The 2019 World Bank report ‘*The Changing Nature of Work*’ has estimated that the global labour force totals around 3.5 billion people, which comprises people over the age of 15 who supply labour for the production of goods and services.<sup>15</sup> Of this total, less than 3% engage in freelance work and less than 0.5% participate in the gig economy globally, with less than 0.3% in developing countries.<sup>16</sup> This suggests that the true size of the platform work labour market, while not immaterial, is by no means as significant as postulated. It is also possible that in a tight labour market - as is being experienced in the post-pandemic economic overhang - that this number may have stopped growing or even begun to moderate.

Web-based platforms make up a smaller segment of the platform economy relative to location-based platforms. Researchers at the Online Labour Observatory estimate in 2021 that approximately 14 million people have obtained work through web-based work platforms; yet only 3.3 million of them (2% of the 193 million registered) have completed 10 projects or earned over \$1,000.<sup>17</sup>

Figure 02 ► Global gig economy revenue by category (%)



13 Victorian Department of Premier and Cabinet. (2019). Inquiry into Victorian on-demand workforce. Victoria, Australia.  
 14 Staffing Industry Analysts. (2016). *The Gig Economy and Talent Platforms*. Mountain View, CA: Staffing Industry Analysts.  
 15 World Bank. (2019). *World Development Report 2019: The Changing Nature of Work*. Washington DC: World Bank. doi:10.1596/978-1-4648-1328-3  
 16 World Bank. (2019). *World Development Report 2019*.  
 17 Online Labour Observatory. (2021). *The Online Labour Index 2020*. Retrieved from Online Labour Observatory: <http://onlinelabourobservatory.org/oli-supply/>

## Platform work has lowered barriers to entry to access decent work, providing workers with flexibility and a pathway to formalized work through skills development

### Access to work for marginalized workers

Many forms of platform work offer unprecedented open access to work. While platform policies vary, in many cases, workers do not need to wait for a job opening or interview for a role. Individuals who have documentation and licenses required by local laws and the means of completing the work required by the platform's requirements can sign up and start earning within a few days.

These relatively low barriers to entry ensure that platform work attracts diverse groups of workers. Women platform workers highlight their ability to better balance caring responsibilities with temporary and task-based work. In an online survey, women workers in particular appreciated that they could work from home and combine it with care responsibilities. Furthermore, higher educated women indicated that platform work raised the chances of getting a job that met their skill level.

Platform work also provides opportunities for disabled workers as the OECD has observed. Last year, Fundacion ONCE<sup>18</sup> and the ILO Global Business and Disability Network found that the ability to manage work independently greatly benefits people with disabilities, particularly for those unable to work full-time or at set times. This is further strengthened by testimonials of platform workers with disabilities who acknowledge that online work platforms have provided opportunities for them to engage in work on conditions that meet their personal situation, including the ability to work remotely. To fully tap into this potential, access to digital infrastructure and relevant (digital) skills for people with disabilities need to be promoted.

These supports are particularly valuable in periods of deep and fast disruption. Women, migrants, and workers from racial/ethnic minorities were some of the workers hardest hit by Covid-19. The flexibility of platform work provided opportunities for new sources of income for these workers. For example, in Australia 64% of new platform workers during Covid-19 said that they were not eligible for government support, the majority due to visa status, and that they turned to platform work to provide an essential source of income during this period.<sup>19</sup> As we move into the post-pandemic economy, this opportunity for ready access to flexible earning to supplement fixed income in an inflationary environment will become increasingly valuable for those that have left work and are unable to easily engage such as self-funded retirees. Platforms can be a crucial partner to national active labour market policies that seek to promote the activation and inclusion of long term unemployed and inactive workers, including those from dedicated target groups including people with a disability, women, new migrants, and young workers.

Web-based platforms have also afforded access to multiple workers who would have otherwise had difficulty sourcing work. For instance, it allows for remote labour market access that is relatively discrimination free. This helps workers that suffer from discrimination in their local labour markets or whose circumstances require them to work from home. These, and other features, like self-management and the diversity of the tasks posted may have important beneficial implications for workers' lives. Furthermore, multiple studies have shown that crowdsourcing platforms provide access to relatively high paying tasks to people from developing countries.

Platform work also allows for increased access to work for marginalized groups who would otherwise lack a service. In Bangladesh, 'Lily', a personal transportation platform that facilitates bike-rides in the crowded traffic of Dhaka city focuses specifically on women. It allows for

18 Fundacion ONCE and the ILO Global Business and Disability Network. (2021, February). *An inclusive digital economy for people with disabilities*. Retrieved from [https://www.ilo.org/global/topics/disability-and-work/WCMS\\_769852/lang-en/index.htm](https://www.ilo.org/global/topics/disability-and-work/WCMS_769852/lang-en/index.htm)

19 Accenture. (2021). *Platforms Work Report Research with workers using the Uber app during the first year of the Covid-19 pandemic*. Accenture.



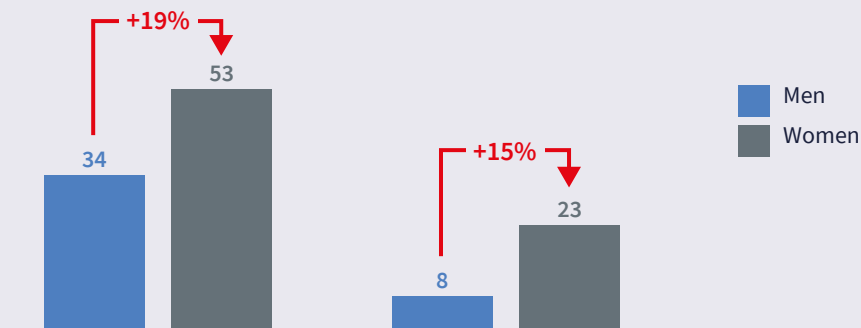
matching of female bike riders to female customers. By doing so, it takes away concerns over safety with women traditionally dependent on male drivers, thereby removing barriers for women to go to work.<sup>20</sup>

Figure 03 ► Opportunities from platform work



% Of new platform workers surveyed who said that not being able to find other work was motivation for joining platform work

% Of new platform workers surveyed, by gender



### Opportunity for work for highly skilled but disconnected workers

In the same way that platform work offers opportunities to bring workers that are not able to access work into the labour market, platform work also offers significant opportunities for workers with skills to continue to work in changing circumstances. Platform work offers significant opportunities for skilled workers and professionals to engage in work that fits their particular circumstances. A 2021 survey of 6,000 Americans found that freelancing is growing among the most educated and moderated amongst the least educated with most freelancers surveyed providing skilled services such as computer programming, marketing, IT, and business consulting. Significantly, a majority of workers with postgraduate degrees preferred freelance work.<sup>21</sup>

### Flexibility is the key reason workers engage in platform work

Platforms provide workers with unprecedented flexibility approaching real-time in some cases. While platform practices differ, in general, workers enjoy greater control over when and where they work, which tasks or services they accept or reject, how they complete the task or service, and when they can stop working in a period or in sum. Workers can, and do, work for multiple, competing platforms at the same time. They do not need to sign up for shifts and they face no penalty if they choose not to work for hours, months, or years at a time.

20 Dhaka Tribune. (2017, December 31). *Lily promises commute solution for women*. Retrieved from Dhaka Tribune: <https://archive.dhakatribune.com/magazine/weekend-tribune/2017/12/30/lily-commute-solution-women>

21 Freelancer. (2021). *NASA & Freelancer Crowdsourcing the final frontier*. Retrieved from Fraalancer.com: <https://www.freelancer.com/nasa/about>



Research from The Adecco Group has shown that flexibility is sought after and appreciated among all workers including in the non-platform economy. But it is important to understand that the flexibility of platform work is dramatically different from the flexibility afforded by traditional employers, which may allow their employees to trade shifts to find hours that work better for them. Such “flexible” arrangements in traditional employment models still come with the expectation that the worker will be available during the specific time to perform the work they were hired for.

Platform workers around the world report that the flexibility of platform work is highly important to them, with a November 2021 Future Forum Pulse survey, administered by Slack, of 10,737 platform workers in the U.S., Australia, France, Germany, Japan and the UK finding that 95% of respondents valued scheduled flexibility<sup>22</sup>. This is further reinforced by location specific research, with a September 2021 survey from EMC research finding that for California based platform workers; 75% prefer being an independent contractor to employment, 89% saying that the flexibility to decide when to work is very important, and 79% noting that being their own boss was very important.<sup>23</sup>

A large-scale study by Copenhagen Economics, covering over 16,000 couriers across Europe, found that for over two-thirds of respondents, flexibility was the main reason for working in the gig economy.<sup>24</sup> The flexibility of the work was critical for many couriers to be able to work, and, if forced to work pre-determined hours by the platform or another employer, up to 250,000 couriers in Europe would lose the opportunity to work in food delivery.

Flexibility is also highly important for web-based platform workers. Flexibility and independence also feature prominently in the Freelance Satisfaction Index in 2021 that collects the perspectives of 1,900 freelancing workers engaged with 75 web-based online work platforms. Of eight variables ranging from flexibility to meeting financial goals, flexibility ranked the highest with 4 out of 5 respondents.<sup>25</sup>

### **Flexibility offered by platform work has real monetary value**

Importantly, the flexibility that is enabled by platform work is itself differentiated from flexible working hours within traditional employment frameworks including part-time or contract work. The flexibility offered by platform work that allows changes in near real-time is only possible where there are no expectations or commitments to minimum working hours and where there is no scheduling for working hours or shifts. While there is some business model variation between these approaches, it is important to note that the nature of platform work is that it is ultimately worker-driven and determined.

Numerous studies have also shown that workers would not engage in platform work if this flexibility was compromised. A 2019 study in Chile and Mexico found that Uber drivers would need their pay to be more than doubled in order to motivate them to switch to a traditional employee job.<sup>26</sup>

A Yale study in 2017 found that the flexibility afforded by app-based rideshare work was equal to US\$150 per week of surplus to workers.<sup>27</sup> This surplus is eight times as valuable as what is offered by a taxi-style arrangement, in which drivers would have to choose in advance one of three set daily shifts. This is because drivers earn more surplus per hour and choose to work more hours when they can flexibly respond to shocks instead of pre-committing to a shift.

22 Future Forum. (2021). Leveling the playing field in the hybrid workplace. Retrieved from <https://futureforum.com/wp-content/uploads/2022/01/Future-Forum-Pulse-Report-January-2022.pdf>

23 EMC Research. (2021). California app-based rideshare and delivery drivery survey. California.

24 Copenhagen Economics. (2021). The value of flexible work for local delivery couriers: Evidence from a novel, large-scale pan-European courier survey. Retrieved from: <https://copenhageneconomics.com/wp-content/uploads/2021/12/copenhagen-economics-study-of-the-value-of-flexible-work-for-local-delivery-couriers.pdf>

25 University of Toronto. (2021). Freelance Satisfaction Index. Toronto, Canada.

26 Azuara, O., González, S., & Keller, L. (2019). *Who drives on ride-hailing platforms in Latin America? A profile of Uber drivers in Brazil, Chile, Colombia and Mexico*. Inter-American Development Bank.

27 Yale University. (2017). Quantifying the value of flexibility for Uber’s Driver-Partners. Retrieved from: <https://medium.com/uber-under-the-hood/quantifying-the-value-of-flexibility-for-ubers-driver-partners-29395a3f1888>

Similarly, an Oxford University study found that the median driver working with Uber in London would require a 25% hourly pay increase to accept working fixed rather than flexible hours.<sup>28</sup> Further research in 2020, found that the negative impacts of any loss of flexibility would be felt more acutely by women, minority groups, and lower-income and marginalized workers.<sup>29</sup>

### Platforms play an important role in human capital formation and skills development

Platforms play a key role in the promotion of employability and training. In this way, they play a key role in the up-skilling and re-skilling of the global workforce. A 2021 Accenture report found that 65% of new platform workers said they gained valuable skills that could help in future work prospects, and 76% of platform workers were optimistic about their future work opportunities and prospects.<sup>30</sup> Multiple platforms have taken significant steps to create learning opportunities for employees active on their platforms:

- ▶ People working with Uber have access to various free learning opportunities. In Latin America they have free access to online learning focused on financial literacy. In Kenya and South Africa, they have access to a free learning programme on entrepreneurship skills, ranging from handling finances to problem solving.<sup>31</sup> In the US and in several European countries, Uber partners to provide eligible drivers and couriers with access to fully funded undergraduate programmes, language training, and programmes focused on business administration and personal leadership. Around the world, eligible drivers and couriers in most countries where Uber operators can profit from a partnership with Rosetta Stone for language training. There are real digital and financial literacy skills that many workers on platforms - especially in developing countries - gain simply by moving from offline, informal, cash-based work to platform work.
- ▶ In close collaboration with worker representatives, employment agencies in Europe have set up a variety of training funds for temporary workers to save for training as they work across different assignments, companies, and sectors. This has resulted in over 5.9 million workers being trained through their labour market intermediaries.<sup>32</sup>
- ▶ In India, Urban Company, an on-location platform specialized in personal services such as home improvement, beauty and wellness, has partnered with the Indian National Skills Development Corporation to provide training to the entrepreneurs on their platform<sup>33</sup>. Through this they have set up 15 training centers with over 100 trainers to ensure quality. Courses include entrepreneurial and care skills as well as soft skills. This has lifted work prospects, quality and earnings for the workers, which consist mostly of women.

### Platform work can also offer a pathway to formality

Platform work is important, particularly in developing countries, to pathways for the transition to formal work. Platforms are formal and comprise visible enterprises, which increase formality of a work relationship through the written conclusion of contracts. The benefits of formality also accrue to governments and public finances through additional tax revenue with outsized value for developing countries with otherwise narrow revenue bases.

28 Oxford University. (2018). Uber Happy? Work and well-being in the “gig economy”. Retrieved from: [https://www.oxfordmartin.ox.ac.uk/downloads/academic/201809\\_Frey\\_Berger\\_UBER.pdf](https://www.oxfordmartin.ox.ac.uk/downloads/academic/201809_Frey_Berger_UBER.pdf)

29 EMC Research. (2021). California app-based rideshare and delivery drivery survey. California.

30 Accenture. (2021). *Platforms Work Report Research with workers using the Uber app during the first year of the Covid-19 pandemic*. Accenture.

31 Uber. (2021). *2021 ESG Report*. Uber.

32 WEC. (2019). *Social Impact Report*. Brussels: World Employment Confederation.

33 Urban Company. (2019). Urban Company and NSDC enter into a partnership on World Youth Skills Day. Retrieved from: <https://www.urbancompany.com/blog/company-updates/urban-company-and-nsdc-partnership/>

The infrastructure of platforms also allows the administration and provision of social protections:

- ▶ In India, regulation has been adopted to grant access to safety nets for platform workers. This provides an interesting venue to how appropriate regulatory reform can bring workers into the formal sector.
- ▶ The importance of platform work to informal economies is highlighted in research from Indonesia, which has a non-agricultural informality rate of 80,2%. Through interviews with drivers for personal transportation platforms (mainly from the platforms “GoJek” and “Grab Bike”) showed that these drivers perceive this work as opportunities to leverage their assets and earn a better income. Moreover, they felt that working through the platform was better than their previous job. These drivers had a background of both informal and formal work. This study also addresses how these platforms supported the subscription to different governmental support schemes.
- ▶ In Peru, only 10% of the independent workers are able to save.<sup>34</sup> Cabify, a personal transportation platform, together with the Inter-American Development Bank and other partners, have created personal accounts for Cabify drivers in Peru to automatically save a percentage of their income including dedicated savings for pensions.

## **There has been significant progress in platform business models, policy development and worker advocacy to secure workers rights and protections and to expand regulatory coverage**

### **Jurisdiction-level policy development**

There have been a series of recent policy developments globally targeting secure working rights and protections for platform workers. This global trend of national and sub-national advances has extended across multiple continents and seen significant progress in recent years.

In North America, Proposition 22 was passed in California in November 2020 which guaranteed a series of benefits for drivers and couriers in platform work, including an earnings guarantee, healthcare stipends, injury protection insurance, and safety training. Significantly, after implementation Proposition 22 continues to show strong support with workers with a survey in September 2021 finding that 88% of platform workers considered that it has been good for them.<sup>35</sup> In Washington State in the United States, Governor Jay Inslee signed into law a bill drafted in collaboration with Teamsters 117 and their affiliated Drivers Union that preserves rideshare driver independence and confers new benefits such as a minimum earnings guarantee, injury protection and paid C leave, and a process to appeal deactivations.

In Asia, India passed national legislation in 2020 that requires platform companies, or aggregators, to make contributions toward a social security fund for gig and platform workers. Under this Code, ‘platform work’ is defined as “an employment form in which organizations or individuals use an online platform to access other organizations or individuals to solve specific problems or to provide specific services in exchange for payment”. The code also indicates that such workers, albeit not employees, may be provided with certain social security benefits as determined by the central government. These may include life and disability cover, accident insurance, health and maternity benefits, old age protection, crèche and childcare services, and other benefits.

<sup>34</sup> Universidad del Pacifico. (2019). The impact of digital savings account on savings and welfare: Evidence from gig-economy workers in Peru.

<sup>35</sup> EMC Research. (2021). California App-based rideshare and delivery driver survey.

In Europe, France passed the 2019 Mobility Bill which enabled the government to legislate on platform workers' collective representation, and ordinances passed in 2021 and 2022 clarified criteria for platform workers' autonomy and set up a mechanism for sectoral bargaining on platform workers' working conditions, including earnings. Eligible platform workers participated in the first-ever sectoral social dialogue elections in May 2022 and the first round of negotiations are expected to start in the coming months. This built on the El Khomri regulation from 2016 which extended occupational accident coverage and the right to organise to a broader group of workers.<sup>36</sup>

In 2021, the European Commission proposed a directive to improve the working conditions of platform workers, giving platform workers access to paid holidays, minimum wage, health and safety protection, health benefits, workers' compensation and parental leave.

In South America, the Chilean legislature passed a law that incorporates platform workers into the government's healthcare and pensions scheme and introduces new requirements for platform companies to guarantee earnings at 120% of the minimum wage for time spent actively working, maintain on-app insurance coverage, provide couriers with safety equipment, and reconsider disputed decisions. The bill also provides a pathway to unionization for independent contractor workers.

### Platform business models

There has been significant progress by companies on offering social protections to those that engage with work on their platforms. In France, Deliveroo offers sick pay to its riders free of charge. This is provided irrespective of whether the sickness is related to the work through the platform. In the USA, Postmates has rolled out a package of benefits that includes free occupational accident insurance, 24/7 access to medical support, discounts on life and disability insurance and prescriptions as well as prescription medicines. Also, it provides access to career mobility support. In Europe, Uber has partnered with AXA, an insurer, to tailor coverage for occupational incidents and disability. The insurance programme is provided free of charge to the workers engaged through the Uber platforms.

At the same time, platforms have also increased their transparency around the algorithms used to connect platform workers to work and the collection of data from their workers and customers. In 2022, Finnish delivery platform Wolt published an Algorithmic Transparency Report outlining how their algorithms offer work to couriers, calculates pay and estimated delivery time, and the data the app collects from couriers and customers, based on the UK Algorithmic Transparency Standard.<sup>37</sup> The EU has proposed a directive to increase the transparency of algorithms used by platforms.

### Worker advocacy

Across different countries, we are also seeing some innovation from worker groups, sometimes in collaboration with platforms, to develop innovative models for organizing, representation and advocacy. While this is not a historically common space for cooperation, in the post-pandemic era and as a function of relationships of trust, we are seeing more evidence of increasing dialogue between parties.

Chile explicitly allows for the creation of trade unions of independent contractors but does not allow these associations to engage in strike action or collective bargaining. In India workers only gain collective bargaining rights if their trade union gets recognized. Selected provinces in Canada allow 'dependent contractors' (an intermediate worker classification) to unionize. In Australia, a trade union which represents independent contractors in the transportation industry has recently struck agreements to cooperate on worker voice, policy matters and best practice with DoorDash and Uber.

<sup>36</sup> France Law 2016-108 of 9 August 2016

<sup>37</sup> Wolt. (2022). Algorithmic Transparency Report. Retrieved from: <https://explore.wolt.com/en/fin/transparency>

In the USA, freelancers and platforms have organized themselves on state and federal levels to engage policymakers on issues of interest. For example, the Association for Independent Workers and several online work platforms have shaped the Coalition for Workforce Innovation (CWI) to promote quality platform work and ensure independent workers can access work and benefits.

The European Commission has also released draft Guidelines on the application of EU competition law to collective agreements regarding the working conditions of solo self-employed people providing services.<sup>38</sup>

## **Broad-based and generic changes to classification have been shown to have detrimental effects for workers by reducing access to work and flexibility and have failed to deliver on the promise of greater security**

Changing the underlying economics of platform work from a pay-per-job model to pay-for-time has been shown to reduce the availability of platform work and workers' freedom to set their own schedules and to adjust them to accommodate any contingencies that arise during the day. It is important to recognise that there are necessary steps that need to be taken to avoid situations of bogus self-employment where workers are in a subordinated relationship and are in arrangements that can be considered sham contracting. Aside from the nature and method of the work, different roles have different hierarchies and responsibilities which influence how the working relationship is structured. Workers and businesses need clear rules on worker status that meet modern working relations and make sense for 21st century workers and businesses. The ILO has already provided guidelines on the difference between independent contractors and employees.<sup>39</sup>

Inappropriate classification of workers can turn detrimental to both workers and businesses. Misclassifying workers as employees may take away their freedom to organise their work and their own safety nets as they see fit and create additional costs for the worker and the business. Similarly, classifying workers as self-employed when they should be employees can lead to a lack of social protection, and poses legal and compliance risks for businesses – and therefore, it is imperative that the rules are clear and up to date.

Workers have a deep understanding of this tradeoff: Many have worked hourly jobs, where they have to show up 8 hours a day, 5–7 days a week, irrespective of circumstances. The vast majority of workers in platforms choose app work precisely because it is different from being an employee. Research from UCLA estimating driver demand on ride-hailing platforms for hourly and daily flexibility finds that drivers who are female, Black or Hispanic, or from a poorer area tend to value this flexibility the most – and stand to lose the most if faced with mandated employment.

If platform companies were required to only offer employment, it's logical to assume they would have to set up similar structures as companies that depend on an hourly workforce. In California, Uber analysis found that reclassifying app-based workers as employees would result in 158,000 fewer work opportunities, or a 76% reduction in work volume for drivers, due to increased prices for riders and thus lower demand. Markets that have lower demand would be even harder hit and would expect to see even sharper increases in prices and reductions in work.<sup>40</sup>

38 European Commission. (2021). Consultation Document - Second-phase consultation of social partners under Article 154 TFEU on possible action addressing the challenges related to working conditions in platform work. European Commission. Retrieved from European Commission: <https://ec.europa.eu/social/BlobServlet?docId=24094&langId=en>

39 ILO. (2006). R198- Employment Relationship Recommendation. Retrieved from: [https://www.ilo.org/dyn/normlex/en/f?p=NORMLEXPUB:12100:0::NO::P12100\\_INSTRUMENT\\_ID:312535](https://www.ilo.org/dyn/normlex/en/f?p=NORMLEXPUB:12100:0::NO::P12100_INSTRUMENT_ID:312535)

40 Uber. (2020). Analysis on impacts of driver reclassification. Retrieved from: <https://medium.com/uber-under-the-hood/analysis-on-impacts-of-driver-reclassification-2f2639a7f902>

In Geneva, Switzerland, for example, a series of court rulings in September 2020 prohibited couriers from working on Uber Eats as independent contractors and mandated that anyone working on the platform be classified as an employee of a fleet operator. The immediate effect of this change was Geneva's deliveries falling by 34% week on week. Over the following year, work opportunities remain depressed, with an estimated 67% reduction in workers using Uber Eats, and order volume reduced by 42% due to higher delivery fees and longer waiting times.<sup>41</sup>

None of this is to suggest that platform work and its enabling structures are perfect - in fact there are proposals for reform in this report itself. However, in making wholesale changes to the model of work engagement, it is important to approach it from deeper awareness of its distinct value to participating workers and be mindful of the unintended consequences of limiting access to this mode of work.

## Looking forward, Governments, Employers and Business Member-based Organizations (EBMOs) and platform companies all have a role to play in shaping the policy approach to platform economies and labour markets

### Jurisdiction specific solutions are important to address the diversity of platform work

All stakeholders and social partners need to recognize the 'platform work' space is inherently heterogeneous. The key implication of this is that due to this diversity in platforms it will simply be too generic and ineffective to assume a global standard can make a meaningful and constructive impact on the real world, especially when national and local arrangements are already in place and making an impact in certain types of platform work. Not all platform workers can be seen as the same, and neither can we treat all work platforms in the same way. Indeed, business models within a platform company can differ and business cases continue to evolve. Platform work entails different labour market segments, differing skill levels, outcomes, intermediation, tasks, client focus, and contractual labour relations. Consequently, the impact of platform work varies significantly across different national realities, markets, and labour market segments; thus, emphasizing the importance of a tailored, granular, and national/regional approach in dealing with this facet of the economy. Policy intervention needs to be targeted, proportional and add value to specific businesses, workers, and consumers at large. Generic and broad-based approaches may end up serving to achieve, at best, multiple layers of regulatory coverage without delivering for these stakeholders and at worst, counterproductive outcomes that restrict work for many people that do not have accessible labour market alternatives and denying millions the benefits and dignity of work.

### There are existing processes and reform initiatives that are best suited to address the challenging aspects of platform work

In reference to regulations, a 'one-size-fits-all' generic approach must be circumscribed. Platform work is a multi-faceted and complex concept; it can range from B2B consultancy to peer-to-peer volunteer work. As such, creating an international standard on platform work will divert attention, resources, and energy from the urgent need to develop and promote policy interventions for implementation by national and regional labour market institutions, including safety nets to accommodate a dynamic and digital economy and a quickly transforming world of work. Focusing on these initiatives will help to move past debates centered on outdated legal frameworks that are

<sup>41</sup> Uber. (2021). Assessing the impact of courier reclassification in Geneva 1 year on: restaurant demand and work opportunities fail to recover. Retrieved from: <https://medium.com/uber-under-the-hood/assessing-the-impact-of-courier-reclassification-in-geneva-1-year-on-restaurant-demand-and-work-b85ac573b804>



forcing platforms and workers to make a choice between flexibility and security at precisely the moment when both are needed.

In considering the best ways to deliver this choice for workers while ensuring that we continue to meet and exceed social expectations around decent work, we need to recognise that there are existing mechanisms in place; that there are local reform efforts already underway; that social partners are collaborating on solutions; and that there are risks with all-encompassing arrangements for workers, merchants, customers, and platforms.

### **Regulation should maintain the flexibility which many workers desire**

Platforms and workers should have legal clarity on workers' classification and courts have taken a role in clarifying and assessing particular arrangements. In shaping national common understanding of variables such as accountability, economic independence and supervision, collaboration with the workers' and business' communities at the national level is key, including the active participation of communities of platforms and self-employed workers. Platform technologies and the new ways of organising work must also engage with policymakers to accelerate 21st century frameworks for diverse forms of work that are underpinned by social expectations for safety, protections and social mobility. Policy makers and social partners on all levels should welcome the power of enhanced labour market matching opportunities to offer access to work in positive, unprecedented, and unforeseen ways by working to evolve and reform existing systems in specific, national and regional labour markets.

### **The sustainability and value add of social protection systems need to be integrated**

Safety nets must support labour market transitions and new ways of working that meet the growing demand for more flexible options in ways that accord with norms around fairness, decency and growth. In addition to basic social protections around welfare and safety, these social protections need to enable up-skilling and reskilling and promote quality transition support through private and public means. It will entail social markets, risk pooling arrangements or portable accounts, as well as innovative use of voluntary and mandatory schemes, which allow resources to grow as workers transition across sectors, occupations, modes of working and contractual arrangements during their careers. Social protections may be offered to incentivise individuals to access more job opportunities through skills development and active labour market programmes. There is an opportunity to expand and enhance public-private partnerships and cooperation. Platforms that want to do more for their workers face fierce competition; they need the competitive level-playing field that comes from national and local policy changes that mandate benefits provision and contributions across the sector.

### **The benefits of platform work are contingent on the access to digital infrastructure**

Governments should partner with business to connect the billions of people still unable to adequately access the online community and economy. Specific attention is needed for rural areas in all countries. This 'infrastructure' includes the development of social infrastructure (as set out above) as well as digital skills, not in the least for elderly, female, youth and workers with disability, and other labour market groups in all parts of the world. This will enable people to make the most of online opportunities for services provided through platform work including accessing opportunities to derive income from work and enhance social mobility especially in underserved communities. This can only be realised if the 'digital divide' in many societies is addressed and there is ubiquitous access to the enabling environment for platform work through digital infrastructure and training support.

### **Ensure a level playing field among platforms and across all labour market intermediaries**

Given the dynamic nature of platform work, the non-existent or low barriers to switching, the ability to work across different modes and that platform work represents a relatively small part of



the broader labour market it is important that any national (or regional) systems for occupational, sectoral and/or business classification should be current, transparent and targeting outcomes rather than inputs. As technologies and business models evolve, product market regulations should evolve to incorporate technological advancements and the blurring of traditional sectoral and occupational demarcations. Accordingly, opportunities for platform work and businesses should be treated similarly to ensure a level playing field. The platform economy is vast and widespread. Not all platforms deliver the same service and output. Some (if not most) platforms operate marketplaces for goods and services that have existed for decades. Policymakers and stakeholders within the system need to ensure that there are appropriate arrangements in place to ensure that regulatory overlaps and policy gaps are minimised.

### **Tripartite social dialogue is essential for the governance of platform work**

All parties recognise that policies must incorporate tripartite social dialogue. This would deliver the expertise and legitimacy needed for the social innovations that empower labour market participation, lifelong learning, and sustainable employability in diverse forms of work. Regulating the platform economy, in particular, requires further observations as this field is still relatively early in its development. Furthermore, its constant evolution demands careful assessment to avoid unintended consequences. In finding solutions through social dialogue, labour market stakeholders need to respect the vast variety of traditions of social dialogue on the national level. It is exactly that diversity that empowers and enhances social dialogue as a tool for involvement, legitimacy, and compromise. This is critical for buy-in on policy interventions and implementation. Significantly, worker organisations are already organizing where they have a common interest and need to protect it, and unions and platforms are talking. In some places, like France, formal social dialogue mechanisms are being adapted to better reflect the nature of the work and sector.

To be sure, social dialogue can at times be difficult and challenging. Achieving sustainable outcomes takes strong political will, trust, effective coordination, allocation of resources and related factors, by Governments and their social partners. The maturity level of industrial relations, and the culture that comes with it, also plays a role. At times of crisis, issues such as Covid-19 pandemic, geopolitics, energy and food crisis, all compete for the attention and focus of policymakers.

It is highly recommended, however, for representatives or focal points at employer federations in-country to take the time to participate in policy dialogues on platform economy. This is increasingly becoming an important policy topic at the international, regional and national levels, and it would be critical to influence and shape policies together, at the earliest opportunity, with other major stakeholders.

### **Governments, platform companies and EBMOs should work together to offer relevant and useful information and data to help facilitate policy development at the national level**

As the debate around platform work and the heterogeneity of business models, worker experiences and service delivery become better understood, there is greater scope for government and platform companies to share data to support deeper research and the development of policy solutions that can be tailored and better shaped for national and regional markets. There is, of course, already a significant amount of information, data and research that is available in the public domain that can support this work. Further, platform companies have demonstrated that they are willing to share data where it is consistent with principles of privacy and data anonymity which represent an opportunity for larger scale and ongoing collaborations and integrations with statistical agencies.

EBMOs should continue to partner with and consult the International Organisation of Employers for guidance and technical advice. The IOE experts have been following, shaping and monitoring the topic of the Future of Work in the past decade and have knowledge, foresight and technical advice to offer, particularly on the platform economy, to Employers and the private sector. Its active engagement at the United Nations, International Labour Organization, OECD, G20 and other

forums as the global voice of business demonstrates its effective advocacy work and influence on policy debates.

### **Platform companies should join or partner with EBMOs at the national level**

Employers and Business Member-based Organizations (EBMOs) naturally have competing priorities – and new and legacy members' concerns to accommodate. While there are draft proposals in Europe regarding the application of EU competition law to collective agreements, established EBMOs can provide an efficient mechanism for representation and engagement including where competition and anti-collusion laws create caution for platforms seeking to legitimately work together. Similarly, EBMOs should be encouraged to consider and view platforms as the next generation of members and a growth opportunity to be seized.

EBMOs are at the core of the action on labour and social issues at the national level. As a social partner, EBMOs are well-positioned to offer technical and practical advice on the latest developments on national labour laws, policy interventions and programmes. EBMOs are likely aware of the latest conversations and policy developments (or planning) on platform work. As they understand and speak the business language and share similar concerns, EBMOs may offer services or opportunities which can help platform companies anticipate legal requirements, make better informed decisions and have opportunities to shape policy developments at the national level. It would be critical to start engaging EBMOs at the outset before labour laws start to be reformed or policies start to be implemented.

Depending on the nature of the business and the services the platform provides, it could be worth joining forces and teaming up with other platforms, especially smaller ones to provide inputs and insights on the challenges they are facing. This will help EBMOs consolidate and convey the collective voice of business platforms to policymakers. It is likely that similar platforms face common challenges. It would be critical for platform companies, either online work platforms or location-based platforms, to share their concerns and challenges with EBMOs, which in turn can help lobby, defend and advocate for platform's interests. This will help policymakers better understand the nature of the business, and how this can impact employment generation and help individuals to better access economic and business opportunities.

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