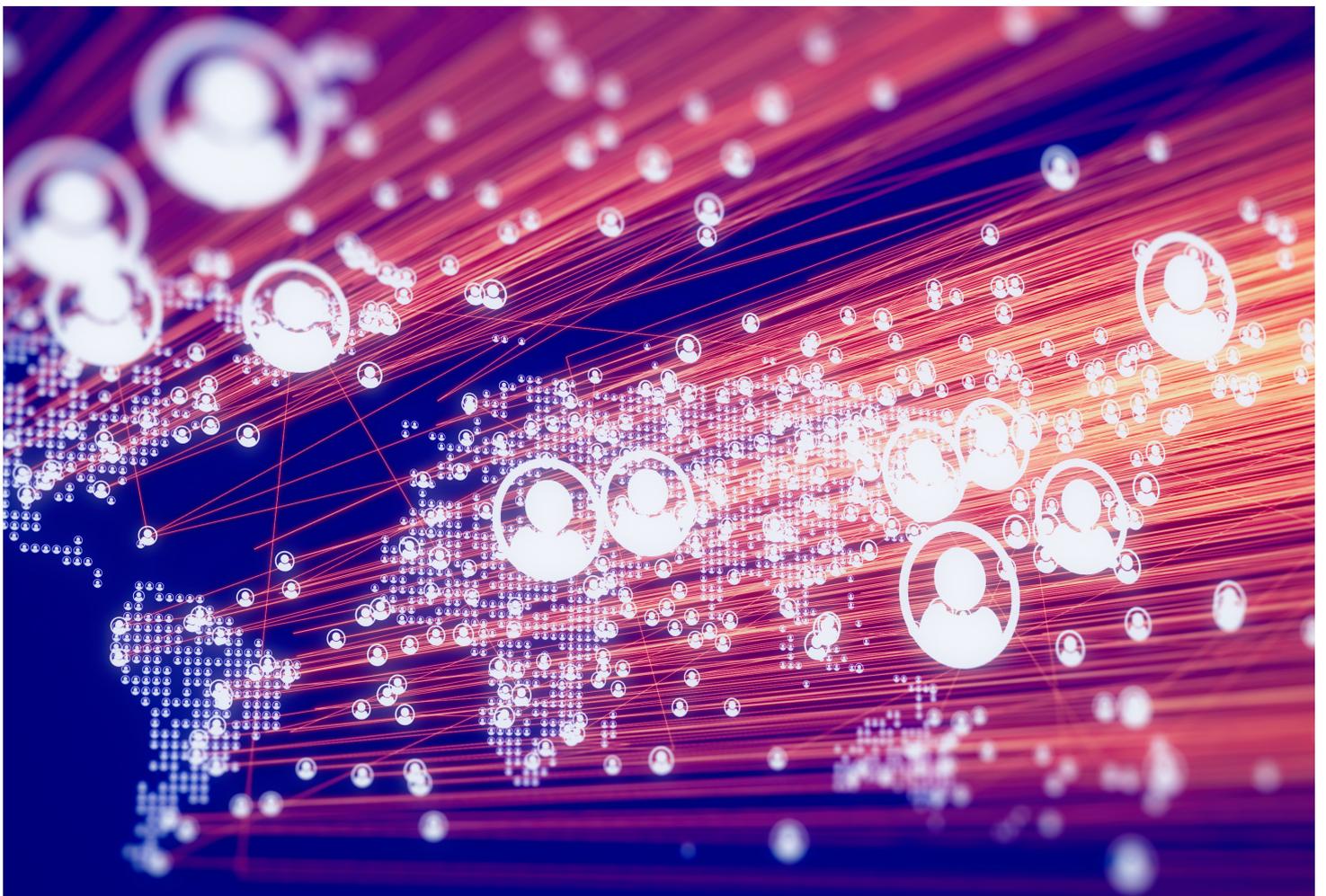


Platform for Shaping the Future of the New Economy and Society

The Promise of Platform Work: Understanding the Ecosystem

January 2020



This white paper is produced by the World Economic Forum's Platform for Shaping the Future of the New Economy and Society as part of its Promise of Platform Work project, which is working with digital work/services platforms to create strong principles for the quality of the work that they facilitate. It accompanies the Charter of Principles for Good Platform Work.

Understanding of the platform economy has been held back by two key issues: lack of definitional clarity and lack of data. This white paper focuses on definitional issues, in line with the objectives of our Platform Work project. It maps the different categories of digital work/service platform and the business-model-specific and cross-cutting opportunities and challenges they pose for workers. It is designed to help policymakers and other stakeholders be more informed about such platforms and about the people using them to work; to support constructive and balanced debate; to aid the design of effective solutions; and to help established digital work/services platforms, labour organisations and others to build alliances.

While this paper provides some data for illustrative purposes, providing deeper and more extensive data to close the gaps in the understanding of the platform economy is beyond the current scope of this project. We welcome multistakeholder collaboration between international organisations, national statistical agencies and digital work/services platforms to create new metrics on the size and distribution of the platform economy.

This report has been published by the World Economic Forum. The views expressed in this white paper do not necessarily represent the views of the World Economic Forum, its Members and Partners, or the signatories to the Charter of Principles for Good Platform Work. White papers are contributions to the World Economic Forum's insight and interaction activities and are published to elicit comments and further debate.

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Key Findings

Digital work/services platforms are making available affordable services to consumers, and offering companies and clients greater opportunities to access talent with the skills they need. These platforms are also providing flexible opportunities for earning income, helping many platform workers to achieve economic security and greater control over their working hours, develop skills and enjoy their work.

However, the rapid adoption of technology, innovation in business models and the diverse ways in which people work through platforms poses challenges for the current rules and laws governing work. There is also ongoing debate around benefits and social protections for platform workers. Failure to find solutions to ensure good platform work would risk undermining the platform economy's potential to grow responsibly and make an increasingly positive contribution in the new economy.

Digital work/services platforms are distinct from the broader gig economy and the sharing economy

Companies operating digital platforms for individuals to hire out their skills and services to businesses or consumers have experienced rapid growth in recent years and disrupted a range of sectors. Such 'digital work/services platforms' range from ride-hailing to professional services. They offer numerous benefits to workers and users/clients, but also pose challenges for working standards and for regulators. Definitional clarity is an important starting point in addressing these challenges. The platform work economy is sometimes referred to as the gig economy, but the gig economy also includes other forms of contingent work, e.g. non-platform freelance contracting and consulting, and temporary workers provided by staffing agencies. Digital work/services platforms can also be distinguished from platforms that solely enable the sharing of assets (such as Airbnb) or sell goods (such as Ebay).

The platform work/services economy is relatively small, but is growing rapidly

In 2018 digital work/services platforms processed around USD126bn of spending globally (less than 3% of the total gig economy).¹ Spending was up 43% year on year.² Just two companies—Uber and DiDi—accounted for around two-thirds of the platform economy by gross spend. Many platforms remain loss-making, and it is not yet clear what sustainable business models will look like. However, platform work could play a growing role in the new economy, as tradi-

tional employment and independent work increasingly intersect, as the distinctions between the platform economy and traditional staffing models potentially erode with the expansion of platform-based models, and as drivers for workers to engage in the platform economy persist.

Platform workers are engaged in the platform work economy for a variety of reasons

Around 0.5% to 2% of the workforce is engaged in platform work in OECD economies.³ Although the proportion is relatively low, the number of platform workers is growing rapidly, most notably due to the attractions of open access and flexibility and as a result of economic insecurity. A McKinsey Global Institute report on gig work proposed four categories of independent worker; adapting this, the categories can also be applied to platform workers:

- **Free agents**, for whom the platform economy is their primary income and who are working in it by choice (30% of independent workers overall).
- **Casual earners**, who are supplementing their main income with work in the platform economy by choice (40%).
- **Provisionals**, for whom the platform economy provides their primary income, but who would prefer a traditional job (14%).
- **Financially strapped**, who are supplementing their main income with work in the platform economy in order to make ends meet, but who would prefer not to have to (16%).⁴

Work/services platforms and platform workers can cross geographical boundaries

US firms dominate the platform work space: three-fifths of the 60 largest digital work/service platforms are headquartered in the US. The rest of the leading platform companies are headquartered in other major advanced economies (e.g. the UK), the largest emerging markets (e.g. China), and some high-income smaller economies (e.g. Singapore, the UAE). However, the platform workforce is widely distributed. For example, Upwork has over 12 million freelancers registered in more than 180 countries globally, while Uber has operations in over 70 countries and 4.0 million registered drivers and delivery partners. This geographic diversity poses challenges for regulation, but also means opportunities for national-level discussions to learn from good practice elsewhere.

Platform work offers new opportunities – but also brings challenges that must be addressed

Digital work/services platforms offer considerable benefits to consumers, workers and employers. Benefits of the sector for workers include: flexibility; geographic diversity; greater demand; inclusivity; expanded employment; improved matching; formalization and reliable payment. Platform work could be part of the solution for future-of-work challenges including how to bring jobs to marginalised communities, especially those outside thriving urban centres, and how to redeploy millions of workers whose jobs may disappear because of automation into new roles. However, for these opportunities to be realised, certain challenges for workers need to be addressed: reasonable pay; benefits and social protections; security; upskilling; dignity; representation and balance of power.

Platform work spans multiple tasks, skill levels and industries

The platform economy spans very varied types of business model. Ten main dimensions need to be considered when addressing working standards: 1/ sector/service type; 2/ geographical scope; 3/ task complexity; 4/ legal status; 5/ location of work; 6/ type of client; 7/ equipment required; 8/ approach to pricing; 9/ form of matching; 10/ degree of task

autonomy and flexibility. For a simplified approach, work/services platforms can be placed within four broad categories based on two of these dimensions: the geographic scope of the work and the task complexity. This provides a useful starting point for understanding the range of platforms covered by the accompanying Charter.

Solutions will involve both policy change and platform better practice

There is a case for regulation to evolve to encompass all those who need social protection, rather than excluding those who do not meet a particular definition. Platform companies may follow a similar trajectory to an earlier group of disrupters—employment agencies, which adjusted their practices and business models to address consequences for workers and adjust to new regulation. For the emerging work/services platforms one critical part of the solution must include improving practices, taking on greater responsibility towards the workers who use their platforms, and collaborating with policymakers to increase the scope of benefits and protections available to independent workers under the law. Companies in the sector are already evolving in this direction, albeit some more quickly than others. The accompanying Charter of Principles for Good Platform Work reflects platforms' willingness to expand responsibilities.

A simplified classification of digital work/services platforms

	Location-bound	Global reach
Higher complexity	<p>Location-based staffing Professional services work that requires an onsite presence.</p>	<p>Online freelancing Professional services work, e.g. consulting, legal, design, that can be done remotely.</p>
Lower complexity	<p>Location-based services Primarily personal service work, e.g. driving, delivery services, household tasks.</p>	<p>Online microtasking Administrative work, e.g. data entry, surveys, that can be done remotely.</p>

Source
World Economic Forum

Introduction

Background

The first digital work/services platforms emerged in the mid-1990s, and the sector took off in earnest from the mid-2000s onwards, helped by faster internet speeds and the introduction of smartphones.

The platform economy's rapid growth attests to its value to both individual consumers and business clients. However, it has also attracted considerable controversy. Platform companies have been subject to lawsuits in various countries, notably over workers' employment status, and in some cases their right to operate has even come into question.

The fundamental polarization lies over the responsibilities that platform companies should bear towards the workers who use their platforms, how to ensure suitable safety nets for platform workers, and how to ensure that platform work meets strong standards.

Scope

Platform companies can be divided into companies that provide services based on assets, and platforms that provide services based on individuals' skills and labour. This report is focused on work facilitated through digital work/services platforms. The platform work economy is sometimes referred to as the "gig economy", and platform workers as "gig workers", but the

gig economy in fact has a broader meaning. It also includes "contingent work" characterized by a defined or limited duration, e.g. freelance contracting and consulting that is not carried out through digital work/services platforms, and temps provided by staffing agencies. This report is focused on platform work, not on the gig economy more broadly.

Project journey

The Promise of Platform Work initiative had its origins in a discussion with a dozen leading trade union organisations at the World Economic Forum's Annual Meeting in Davos-Klosters in January 2018. That discussion concluded by proposing a project to better understand the situation of platform workers and the differing opportunities and challenges for workers posed by platform companies' business models, to define more clearly the responsibilities of different stakeholders in the sector and to propose a new vision for platforms' "social license to operate". To this end, the Forum convened a community of platform companies, staffing firms and independent experts to provide input on a mapping of the platform economy and to align on principles for good platform work. The International Trade Union Confederation (ITUC) was also consulted as part of this endeavour. The initiative's initial outputs are this paper and the Charter of Principles for Good Platform Work.

Two key types of platform company



Platforms for sharing and monetizing assets (e.g. Airbnb)

Platforms for individuals to rent out under-utilized assets to others, with the connection, payment and rating taking place through the platform.



Platforms for individuals to hire out their skills and services (e.g. Uber, UpWork)

Platform for individuals to hire out their skills and labour to businesses or consumers, with the connection, payment and rating occurring through the platform, and tasks completed either remotely or onsite.

Digital work/services platforms

Digital work/services platforms are: companies operating digital platforms for individuals to hire out their skills and services to businesses or consumers, with tasks completed either remotely or in-person, either directly or through substitutes. Such companies operate across diverse sectors and range from highly qualified professional services to more routine tasks.

What does this definition exclude?

- Platforms where the service being provided is based primarily on the sharing of a capital asset (e.g. Airbnb), or where a physical good is being sold (e.g. EBay).
- Intermediaries where the transaction is mainly offline, such as staffing agencies and consulting firms.
- Other tech-based talent acquisition solutions such as job boards and vendor-management system (VMS) providers—since these support sourcing and recruitment, but not the full working relationship through to payment.

Typical features of digital work/services platforms are that:

- They create value by bringing together consumers/clients and workers and reducing friction in transactions.
- People are paid for each short-term task or project and use the platform only for the time needed to look for the project and complete it. The payment is facilitated by the platform—or outsourced by the platform to a third-party payment processing service.
- Tasks and projects can be performed remotely or in-person, usually through an online marketplace or app.
- Workers are typically expected to provide their own equipment (e.g. car, computer, smartphone, etc.)

In addition, platforms may have considerable influence over the work performed. For example:

- They decide what information is collected through the platform and how it is displayed, as well as entry requirements.
- Some platforms—but by no means all—also determine pricing (whether by applying a minimum price, setting a standard price or using algorithmic pricing),⁵ as well as curating the service offering.

Several of these features suggest that platforms are not merely technological intermediaries and lie at the heart of arguments that they have responsibilities towards the workers using their platforms.

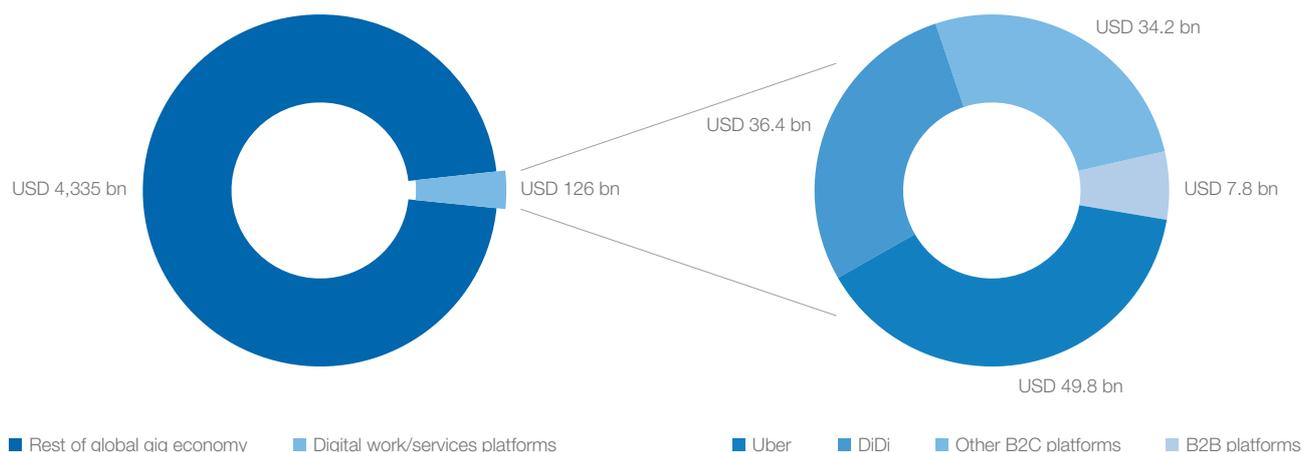
Sizing and growth of platform companies

In 2018 digital work/services platforms facilitated around USD126bn of spending globally.⁶ This comprises less than 3% of a total gig economy globally valued at USD4.5trn⁷ (including independent contractors, temporary agency workers, temporary workers sourced directly by companies and statement-of-work consultants).

However, the platform economy is growing rapidly, with spending up 43% year on year in 2018.⁸ Over 93% of spending in the platform economy, or USD119bn, is through B2C platforms (where the client is an individual consumer), which are also enjoying the strongest growth.⁹ Just two companies whose primary business is ride services—Uber and DiDi—account for around two-thirds of the platform economy by gross spend.¹⁰

B2B spending, where the client is a business, rose by 22% in 2018.¹¹ This part of the platform economy is also relatively consolidated: five B2B platforms, led by Upwork, account for 42% of B2B spending.¹²

Sizing digital work/service platforms (2018 gross spend)



Source

Staffing Industry Analysts; World Economic Forum.

However, many platforms remain loss-making. It is important to keep this in mind when considering platform companies' benefits for workers from the perspective of work opportunities and supplementary income—it is not yet clear what sustainable business models for much of the sector will look like.

Business models: key considerations

Several aspects of digital work/services platforms' business models are particularly important to understand from a perspective of working standards and regulation:

Network effects. Unlike industrial businesses, whose expansion was based on supply-side economies of scale, digital platforms' growth is based on demand-side economies of scale: network effects. The more workers who are active on the platform, the more attractive it becomes for consumers to use the service; in turn the growing consumer base attracts more workers, and so on. Network effects therefore have positive consequences for workers. In ridehailing, for example, as more riders use applications, more drivers connect to them to find customers, leading to a better rider experience (less waiting time, lower fares), and even more riders. This in turn means more business for drivers, less driver downtime and increased earnings.

However, the drive to maximise network effects might lead digital work/services platforms to seek to expand until they have established dominance within a locality or sector. Such market concentration would tend to be unfavourable for workers, as it would limit workers' bargaining power. Lock-in effects and barriers to entry are reduced where platforms do not require exclusivity from workers.

Incentives and subsidies. In order to attract both the workers and consumers required for the platform to expand, platforms may provide incentives and subsidize participation, particularly in the early stages of their growth and when they expand to new cities. Such subsidies may then be discontinued.

Ratings systems. Many platforms rely heavily on the rating of workers by clients following the completion of tasks, and in some cases of clients by workers. This is important for establishing trust and promoting service quality. However, this form of management also makes it important to ensure that ratings are fair, since those workers with better scores will tend to receive more work—owing to both algorithmic and client preferences.

Multihoming costs. Workers face costs to participate in more than one platform—multihoming costs—which may encourage reliance on single platforms, although in fact many workers nevertheless operate across more than one platform in order to maximise opportunities. Multihoming costs include the costs of switching in terms of the time and investment required to set up on a new platform. Rating and reputation systems create another important barrier: workers may be reluctant to join another platform unless they can transfer their ratings, as otherwise they may be in a less advantageous position on the new platform and lose whatever benefit they have gained from building up their reputation. The same may apply to benefits that have been accrued. As a result, portability of data and benefits is often a key issue for workers.

Defining platform work

Platform workers and contractors are: people who earn income from work facilitated by digital work/services platforms, whether as a main source of income or in addition to other work. This includes independent professionals and people who run their own businesses.

Although platforms are innovative in the way that they use technology, the types of service they intermediate are not new. Services such as driving, delivery and design already existed. Moreover, the expansion of platform work comes in the context of a wider rise in contingent work.

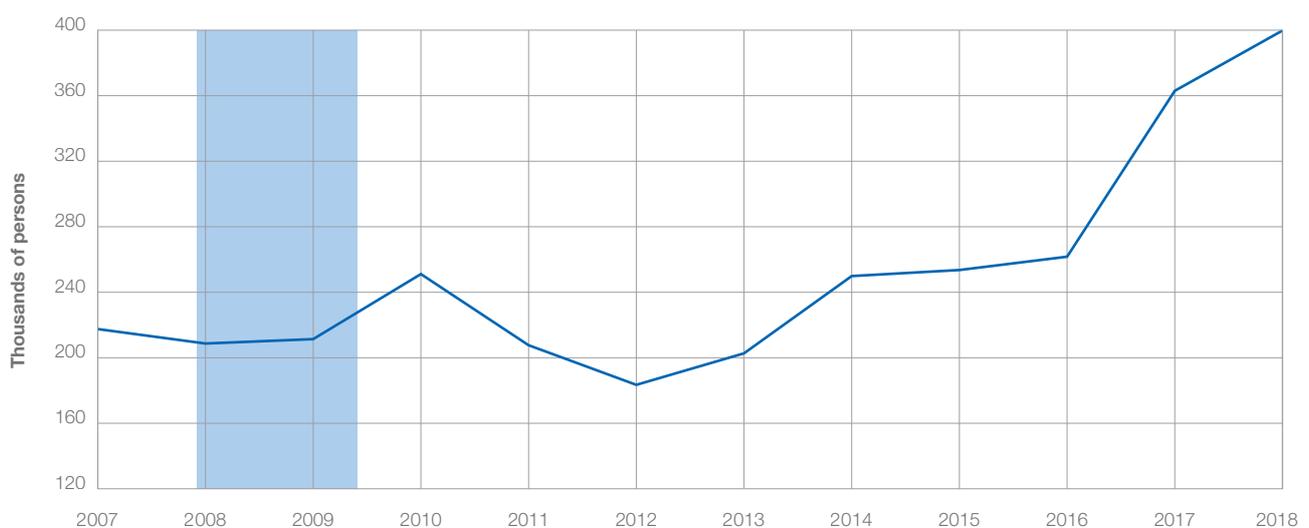
Number and growth of platform workers

Understanding of the platform work economy has been hampered by a lack of systematic and consistent quantitative assessment. For example, current statistical measures tend to be focused on primary sources of income, and often exclude workers supplementing their income¹³—who constitute a large part of the platform workforce. Quantitative assessment may be further complicated by people being counted multiple times where they are registered on multiple platforms, and by the fact that people may not be undertaking platform work in a consistent way across time.

As a result, comprehensive data is lacking. Initial attempts to measure the platform workforce based on existing data led to widely varying estimates.¹⁴ Subsequently, questions on platform work in labour force surveys by OECD members have typically suggested that around 0.5% to 2% of the workforce is engaged in this type of work.¹⁵ Globally, over 70 million workers are estimated to have registered with digital asking platforms that facilitate remote working,¹⁶ and tens of millions more are registered on platforms that provide localised services.

Although the proportion of the workforce currently working in the platform economy is relatively low, the number of platform workers is growing rapidly. For example, the number of taxi drivers in the US has risen strongly over the past five years, primarily due to the expansion of Uber and Lyft—almost 400,000 US adults stated their primary occupation as being a taxi driver or chauffeur in 2018, up from 202,000 in 2013.¹⁷ Such platforms have already disrupted a number of sectors in which they are concentrated.

The rise of platform work: taxi drivers and chauffeurs in the US (as primary employment)



Shaded areas indicate U.S. recessions

Source

US Bureau of Labor Statistics

There are both ‘push’ and ‘pull’ factors behind the rising number of people engaging in platform work, most notably:

- **Attraction of flexibility.** A growing preference for more flexible and autonomous work arrangements.
- **Economic insecurity.** In developed markets, where real median wages are stagnant and economic insecurity has increased, occasional platform work can help people to bolster their incomes. In emerging markets, where the informal economy is still large, platform work can offer a more secure and professional alternative.

With this in mind, different categories of platform worker can be distinguished, based on their motivation and preference for this form of work, and the extent to which they are engaged. A McKinsey Global Institute report on gig work proposed four categories of independent worker; adapting this, the categories can also be applied to platform workers:¹⁸

- **Free agents**, for whom the platform economy is their primary income and who are working in it by choice (30% of independent workers overall).
- **Casual earners**, who are supplementing their main income with work in the platform economy by choice (40%).
- **Provisionals**, for whom the platform economy provides their primary income, but who would prefer a traditional job (14%).
- **Financially strapped**, who are supplementing their main income with work in the platform economy in order to make ends meet, but who would prefer not to have to (16%).

Typology of platform workers

This suggests that a majority of independent workers, at least in the US, either choose this form of work as a preference, or are using such work to supplement their income rather than as their primary work. Metrics differ across studies, but

it appears that similar findings apply to the platform economy more narrowly. Surveys of seven EU countries in 2017 found that 70-80% of platform workers had other work alongside platform work, including more than 50% who were in full-time employment.¹⁹ A study for the European Parliament concluded that only a quarter of platform workers depend on platform work as their primary income.²⁰ Platform work can also help people to bridge periods of unemployment or underemployment.

Two key conclusions therefore emerge:

- **A large proportion of platform workers prefer this form of work**—although a significant number would prefer ‘traditional’ forms of work that provided sufficient remuneration for platform work not to be necessary.
- **Most platform workers are using platform work to supplement their income**—although a significant minority rely on platform work as their primary income.

Geographical distribution

Three-fifths of the 60 largest digital work/service platforms are headquartered in the US. The rest of the leading platform companies are headquartered in major advanced economies (e.g. Germany and the UK), the largest emerging markets (e.g. China and India), and some innovative smaller economies (e.g. Israel and Singapore). Many local start-ups also compete with larger companies. Small and agile apps are able to adapt to local culture or regulatory context efficiently.

The workforce is even more widely distributed. For example, Uber operates in over 70 countries, and has 4.0m drivers and delivery partners registered; Upwork has over 12m freelancers registered in more than 180 countries globally. This geographic diversity poses challenges for regulation, but also means opportunities for national-level discussions—for example in the US—to learn from good practice elsewhere.

Opportunities and challenges for workers

Opportunities

Digital work/services platforms offer considerable benefits to consumers, workers and employers.

Benefits of the sector as a whole for workers include:



Flexibility

Platform workers can typically decide for themselves when, where and how often to work. This may particularly help individuals not seeking or facing barriers to full-time work, such as care responsibilities, mental/physical health limitations and poor local infrastructure. It also allows workers to use platform work to supplement other forms of income.



Expanded income

Many advanced economies have a surplus of unskilled labour that is unemployed or underemployed. Similarly, some emerging economies have a surplus of skilled workers. Platform companies offer options for both types of worker. For example, Uber found in a survey of its drivers in Portugal that 52% had been unemployed before joining the platform, including one-third for a year or more.



Geographic diversity

Platforms can facilitate a more balanced geographic distribution of opportunity for workers, both globally and within countries, through creating more opportunities for remote working and bringing work and services to marginalised communities.



Improved matching

Digital platforms can use information about the preferences of workers and firms to improve the speed and accuracy of the labour matching process.



Greater demand

By reducing barriers to entry and expanding the pool of available workers, platforms may push down prices for services, in turn expanding demand. Platforms also provide access to a larger pool of potential customers for independent workers, and greater opportunities to market their skills.



Formalization

Platforms create more formalized labour transactions, in particular in emerging markets, where a large share of work takes place in the informal sector.



Inclusivity

Platforms may reduce barriers to entry in particular sectors, and for specific parts of the workforce, and do not typically impose limitations or caps on the total supply of work opportunities or restrictions on exit. For example, 82% of Uber drivers in London are immigrants, compared with 40% of the London workforce overall.²¹



Reliable payment

Platform companies can provide quick, reliable payment through digital channels, along with fraud prevention and protection measures.

Challenges

Digital work/services platforms also create challenges for economies and societies that must be addressed.

For workers, and for companies seeking to build their business using platforms, the most notable challenges are listed below—albeit these do not all apply to all forms of platform work:



Benefits and social protections

Platform workers are often classified as independent contractors, which means that they do not have the same safety net as salaried employees and associated rights and benefits such as holidays, sick pay, unemployment insurance, and pensions. Platforms are often limited in their ability to offer such protections by regulatory constraints that only provide for such benefits in the traditional employment context. Additionally, even when platform workers have statutory eligibility to benefits, they may not be able to access them in practice.²² Up to 70% of platform workers in EU economies reported being unable to access schemes such as childcare and housing benefits.²³ Workers are also limited in their ability to transfer benefits when moving between platforms. A further issue is that independent workers, as small businesses, receive less favourable pricing on healthcare than large companies.



Security

There is a need to ensure an appropriate balance of risk with regards to the availability of work, shared across the consumer, platform and worker. For example, in a traditional employment relationship the risk of periods of low demand is borne by the employer; if demand is low, the worker is still paid (in the short to medium term). In the platform economy, the risk is carried primarily by the worker—even more so as workers typically lack access to safety nets. Workers also often lack protection against removal from a platform.



Upskilling

Workers may lack opportunities to reskill and upskill and access to training opportunities through their work. This is particularly important in the context of the Fourth Industrial Revolution, where rapid technological change means ongoing reskilling and upskilling are increasingly important to ensure continued employability.²⁴



Reasonable pay

A key challenge for some lower-skilled work is to ensure that incomes are high enough to support a reasonable quality of life. Because platform workers are often classified as independent contractors, they are often not covered by minimum pay laws.



Representation

Platform workers often do not benefit from the traditional instruments available in many societies to ensure that workers' voices are heard and matter and that their rights are respected, such as collective bargaining and representation.



Dignity and interest

Platform work may commoditize certain tasks within jobs, leading to work that is uniformly mundane and repetitive.



Balance of power

While a successful work/service platform needs strong network effects, excessive market concentration can be detrimental for worker conditions.

Mapping platform services

The platform economy spans very varied types of business model.

A comprehensive differentiation of platforms would span ten main dimensions in terms of the nature of work that they facilitate, all of which need to be considered when addressing working standards and regulation:

- Sector/service type** (which may vary within a single platform company).
- Geographical scope** (location-based, with work occurring and allocated to individuals in a specific geographical area; or global-reach, where work is outsourced to a geographically dispersed crowd).
- Task complexity** (from highly-skilled professional consultancy to routine micro tasks).
- Legal status** of worker (e.g. employee, independent contractor).
- Location of work** (online or offline—in the latter case with online or app-based coordination—and at home, on the employer’s premises or mobile).
- Type of client** (the most basic distinction being between a business or an individual consumer).
- Equipment required** (ranging from a computer or smartphone to a bicycle or a car).
- Approach to pricing** (e.g. full discretion of client and worker, or framework set by platform).
- Form of matching** (e.g. bidding process, allocation by algorithm).
- Degree of task autonomy and flexibility** (how far the platform controls the performance of the work, e.g. whether it determines the order in which tasks would be performed and curates the service offering; how far the platform controls if, when and/or where the work is performed).

For a more simplified classification for the purposes of understanding their opportunities and challenges for workers, it is possible to identify four broad categories of platform, based on two of these dimensions: the geographic scope of the

work and the task complexity. However, it should be noted that this is not an all-purpose definition and should be further differentiated—or complemented with additional segmentations—depending on the required application.

A simplified classification of digital work/services platforms

	Location-bound	Global reach
Higher complexity	<p>Location-based staffing Professional services work that requires an onsite presence.</p>	<p>Online freelancing Professional services work, e.g. consulting, legal, design, that can be done remotely.</p>
Lower complexity	<p>Location-based services Primarily personal service work, e.g. driving, delivery services, household tasks.</p>	<p>Online microtasking Administrative work, e.g. data entry, surveys, that can be done remotely.</p>

Source

World Economic Forum

Location-based services

Location-based platform services can be defined as on-demand work, facilitated by app-based platforms, that connect buyers and sellers for personal services (i.e. predominantly B2C) in local markets. Sectors include driving, varying types of delivery, dog-sitting, in-home healthcare and housework. The work is typically relatively low-complexity and undifferentiated, but also encompasses some higher-skilled segments such as medical advice and IT support.

The model may be 2-sided (e.g. Lyft – passengers, drivers) or multi-sided (e.g. Deliveroo – consumers, riders, restaurants). A standard model is that the platform company sets rules regarding openness, governance and logistics, but does not own the inventory required for the performance of the service. Features of the service may be curated by the platform, which also often determines the basis for pricing.

Existing platforms are also expanding into new sectors, or becoming ‘super apps’ that provide a range of services within a single platform. For example, Go-Jek offers, in addition to ride-hailing and food delivery, services including laundry, home maintenance, wallets and video streaming.²⁵

Key opportunities

Flexibility; formalization; inclusivity; expanded employment; greater demand.

Key challenges

Reasonable pay; benefits and social protections; dignity; security; representation; upskilling.

Location-based services: leading firms

Firm	HQ country	Activity	Focus	Gross spend (USD million, 2018)
Uber	US	Taxi drivers	B2C	49,799
DiDi	China	Taxi drivers	B2C	36,400
Lyft	US	Drivers/taxis	B2C	8,054
Meituan Dianping	China	Drivers/taxis	B2C	7,070
Grab	Singapore	Taxi drivers	B2C	4,000
Ola	India	Taxi drivers	B2C	1,300
Gett	Israel	Taxi drivers	B2C	1,100
Go-Jek	Indonesia	Bicycle rides	B2C	1,100
Grubhub	US	Food delivery	B2C	1,007
Ele.me	China	Food delivery	B2C	1,001
DoorDash	US	Delivery (restaurant)	B2C	960
Instacart	US	Shopping delivery	B2C	875
FREE NOW	Germany	Taxi drivers	B2C	485
Via	US	Drivers/taxis	B2C	478
Deliveroo	UK	Delivery (restaurant)	B2C	407
Postmates	US	Delivery	B2C	400
Rover	US	Dog-sitting	B2C	389

Source

Staffing Industry Analysts; World Economic Forum.

Location-based staffing

Location-based staffing is predominantly B2B and ranges in terms of task complexity from lower-skilled manual work (e.g. warehouse handlers) through moderate-complexity tasks such as administrative work to high-skilled professional services.

This space remains dominated by established non-digital staffing firms, but hybrid models such as just-in-time staffing are narrowing the distinction with platform-based staffing, and some staffing firms and consulting firms are developing their own digital work/services platforms. For example, US-based global industrial staffing company Trueblue has a just-in-time staffing mobile app, Jobstack, with around USD450m revenue annually (larger than most dedicated platform companies in the space), while Adecco has launched ADIA, a temporary work agency that operates through an app (as well as Yoss, an online talent platform). The distinction between platform and non-platform solutions is likely to further erode over time.

Key opportunities

Flexibility; formalization; inclusivity; improved matching, expanded employment.

Key challenges

Benefits and social protections; representation; security; upskilling; balance of power.

Location-based staffing: leading firms

Firm	HQ country	Activity	Focus	Gross spend (USD million, 2018)
Work Market	US	IT/marketing	B2B	235
Field Nation	US	IT technicians	B2B	188
TalentNet	Canada	Various	B2B	150
Zhubajie	China	Various	B2B	102

Source

Staffing Industry Analysts; World Economic Forum; 2018.

Online microtasking

Online microtasking can be performed by workers based anywhere in the world with access to a computer/smartphone and internet/data connection (although language is also a barrier). Microtasks are simple and repetitive “human intelligence tasks” that cannot be outsourced to machines, e.g. testing software or training machine learning algorithms.

The model is typically contest/bid-based, with workers generally paid small amounts, often cents per task. The segment is predominantly B2B. It is currently small, but has considerable scope for expansion.

Key opportunities

Flexibility; geographical diversity; expanded employment; inclusivity.

Key challenges

Reasonable pay; benefits and social protections; security; dignity; representation.

Online microtasking: leading firms

Firm	HQ country	Activity	Focus	Gross spend (USD million, 2018)
LiveOps	US	Call centre	B2B	170
Amazon Mechanical Turk	US	Various	B2B	150 (est)
Applause	US	Software/hardware testing	B2B	120

Source

Staffing Industry Analysts; World Economic Forum; 2018.

Online freelancing

Online freelancing, like online microtasking, can be performed by workers based anywhere in the world with access to a computer and internet connection—although language remains a significant barrier. The work is generally higher-skilled professional services, e.g. designers, programmers, lawyers. Allocation of work is typically contest/bid-based.

The largest firms in this segment control some two-fifths of the B2B market. But there is a long tail of smaller firms across many geographies and professions. Demand is still mainly from SMEs, but demand from larger enterprises is growing rapidly. Among enterprises with over 1,000 FTEs in the US, 20% used platform workers in 2018, up from 15% in 2017, and another 56% said they planned to seriously explore this option over the next two years.²⁶

Key opportunities

Flexibility; geographic diversity; formalization; expanded employment; competition.

Key challenges

Benefits and social protections; representation; security; upskilling; balance of power.

Online freelancing: leading firms

Firm	HQ country	Activity	Focus	Gross spend (USD million, 2018)
Upwork	US	Multi-category freelancers	B2B	1,756
MBO Partners	US	Professionals	B2B	610
Gerson Lehrman Group	US	Expert network	B2B	355
Fiverr	Israel	Logos/designers	B2B	294
Axiom	US	Legal services	B2B	288
EnvatoStudio	Australia	Design/creative	B2B	214
Freelance.com	France	IT/consulting	B2B	188
Toptal	US	Programmers/developers	B2B	180

Source

Staffing Industry Analysts; World Economic Forum; 2018.

The regulatory context

The regulatory challenge relating to the platform economy can be broken down into two broad areas.

1. **Regulatory lag and uncertainty.** As technological developments enable the development of new platform business models, it is not always clear how existing regulations apply to platform models, and attempts to reshape regulation are lagging. Platform companies may therefore confront a shifting and uncertain regulatory environment—and may themselves challenge how regulation should be applied. This can be seen for example in disputes over the employment status of platform workers.
2. **Global diversity.** The global reach of platform work means that companies are operating across many different jurisdictions. Moreover, the cross-border nature of global-reach platform work (where, for instance, the worker, the client and the platform may be located in different countries) creates challenges for regulatory compliance.

Social security systems are not well adapted to the growth of contingent work, having been designed based on a “stable, open-ended and direct employment relationship between a dependent full-time employee and a unitary employer”.²⁷ Platforms argue that classifying workers as employees would force them to reduce the flexibility that workers value. However, regulation, in the US for example, makes it difficult for platforms to provide equipment, benefits, training and upskilling to platform workers without those workers being classified as employees.

Emerging solutions and leadership

The solutions to the challenges posed by the platform economy for working standards are likely to involve a combination of policy change and leadership by platform companies themselves.

This is in line with the ILO’s recommendations on non-standard work, which include “two main complementary axes: (1) making non-standard jobs better; and (2) supporting all workers regardless of their contractual status.”²⁸

In the last 70 years, employment agencies and new ways of working have also disrupted the standard employer-employee relationship and received much opposition and criticism as they evolved. Today the staffing industry provides work for around 50 million workers globally; agencies such as ManpowerGroup find employment for 3 million people across most industry sectors every year and are among the world’s largest employers. This transition over time was driven by responsible players in the industry working closely with governments, policy makers, trade unions and other stakeholders. Although the growth of work/services platforms has been more rapid, the experience of the staffing industry points to one potential path for their future evolution and business model shifts.

While questions over employment status will be critical, there is also a case for regulation to evolve to encompass all those who need social protection, rather than excluding those who do not meet a particular definition. Beyond regulation, part of the solution lies in leadership from platform companies in improving their practices and taking on greater responsibility towards the workers who use their platforms. In an era of stakeholder capitalism, such leadership is critical for maintaining a social licence to operate in the short term and more sustainable business models in the longer term. Companies in the sector are already evolving in this direction, albeit some more quickly than others. The section below includes examples of initiatives taken by platform companies themselves to improve conditions for workers that can serve as examples of good practice to others in the sector and a basis for more holistic action.

Examples of good practice

Diversity and inclusion

[Cabify: Driver engagement programme to promote inclusivity and accessible mobility](#)

Some 1.3 billion people, or 17% of the world's population, experience some form of disability. Persons with disabilities, on average as a group, are more likely to experience adverse socioeconomic outcomes than persons without disabilities. Barriers to full social and economic inclusion include inaccessible physical environments and transportation, the unavailability of assistive devices and technologies, non-adapted means of communication, gaps in service delivery, and discriminatory prejudice and stigma in society. Cabify is engaging worldwide with more than 300,000 drivers to promote visibility of this reality and enable them to offer an inclusive service through recommendations and considerations that they should implement when transporting people with disabilities.

[Grab: Creating opportunities for the deaf and hearing-impaired](#)

Grab Malaysia launched the 'Break The Silence' initiative in 2018 to lower barriers to entry and create opportunities for the deaf and hearing-impaired to join its platform as drivers. The initiative helped Malaysia become one of the few countries where regulations allow the differently-abled to obtain a commercial driver's license. Grab also provides resources including automated message updates and sign guides to help deaf or hearing-impaired drivers identify themselves to passengers, and flashcards to facilitate better communication between passengers and deaf or hearing-impaired drivers. Grab has since rolled out the initiative across the region, with process improvements and new features such as dedicated customer support live chat. In addition, Grab has partnered with Gerkatin (Movement for the Well-Being of Deaf Indonesians) in Indonesia, Malaysia Federation of the Deaf, Singapore Association of the Deaf, and the National Association of the Deaf Thailand to better implement and advocate for inclusive practices to support the deaf and hearing-impaired in the region. Grab has over 500 deaf driver-partners on its platform and is aiming to double this number over the coming year. The initiative has also grown to include the wider community of people with other ability impairments such as loss of limbs or the wheelchair-bound, who are invited to join the Grab platform as drivers, food-delivery partners or merchants.

Safety and wellbeing

[Deliveroo: Rider Safety Advisory Panel in Australia](#)

Deliveroo introduced Australia's first ever rider-run safety panel established by a food delivery platform. The insights and ideas of the 12 riders on the panel will be used to shape safety-related initiatives that will positively impact the experience of Deliveroo riders across the country. The panel focuses on safety for

all riders, regardless of vehicle type or location. The riders on the panel are able to use their experience to: 1) propose safety initiatives to senior Deliveroo staff for the company to potentially adopt; 2) develop safety projects alongside trusted third party partners, e.g. road safety charities; and 3) work with Deliveroo to establish what action could be taken by local and national authorities to improve road safety.

Social protection

[Cabify: Responsible digital savings programme](#)

Hand-in-hand with the Inter-American Development Bank (IDB), the Universidad del Pacífico and Banco de Crédito del Perú (BCP), Cabify in Peru has developed a project for social welfare and financial inclusion of drivers that will allow them to save a percentage of their income automatically. Cabify drivers are able to save a percentage of their total weekly income through an automatic debit to a BCP account. In Latin America less than 10% of the independent workers are able to save any of their income. Cabify is contributing in this way to promoting a formal and banked economy, in alignment with the UN Sustainable Development Goals and 2030 Agenda. Some 40% of drivers were unemployed or at risk of exclusion before working with Cabify, and most drivers lack access to credit. Digital economy platforms allow the company to address this segment of workers. There are two kinds of saving plan: the Emergency Savings Plan allows drivers to save 2% of total earnings per week; the Intelligent Savings Plan debits 3% of income only in drivers' good weeks. The project was rolled out in 2019 and is expanding to offer drivers coverage in case of emergency.

[Deliveroo: Providing sick pay](#)

Deliveroo has announced a sick-pay policy for all riders in France. Riders are automatically covered for loss of income should they fall ill and are unable to work. The sickness does not need to be work-related, but needs to be verified by medical certificate. This means riders have greater security and protection alongside their ability to work as freelancers and enjoy the flexibility and freedom to set their own work schedules, which riders repeatedly tell Deliveroo they value above all else. Deliveroo will look at rolling out similar policies in other markets.

[Postmates: Offering a flexible package of benefits](#)

Postmates rolled out a package of new benefits, and a Flexible Toolkit based on feedback from fleet members that will make it easier to navigate everything from healthcare to taxes to education. It is providing free occupational accident insurance that automatically covers every Postmate on an active delivery on the platform—after a survey showed that more than half of fleet members did not have insurance and worried about getting injured on the job. It also offers access to board-certified physicians 24/7, discounted rates on prescriptions, disability and life insurance, and online bank-

ing options, as well as career mobility support. These new benefits are part of a commitment to listen to fleet members and elevate the voice of worker input on product and policy decisions via the delivery industry's first ever Fleet Advisory Board — a forum where benefits, earnings, and company decisions are shaped by transparent communications.

[Uber: AXA partnership in Europe](#)

Uber partners with leading insurance companies around the world to pioneer protections for independent workers. In the EU, for example, Uber has partnered with AXA, a leading global insurer, to establish its Partner Protection program, which provides insurance coverage to over 150,000 eligible Uber drivers and Uber Eats delivery partners in Europe for major costs or lost income resulting from accidents or injuries that occur on-trip and major life events that happen off-trip, like severe sickness and injury, maternity or paternity leave, and jury duty. To be eligible for the off-trip insurance, a driver partner must have completed 150 trips in the previous eight weeks; a delivery partner on Eats must have completed at least 30 deliveries in the previous eight weeks to qualify. The Partner Protection insurance program is funded by Uber at no cost to drivers and delivery partners.

Learning and development

[Grab: Digital skills for driver-partners and families](#)

Grab has partnered with Microsoft to help bridge ASEAN's digital skills gap. It is estimated that 6.6 million workers across the region will require reskilling for new career paths by 2028, and that 41% of them lack the digital skills that new jobs will demand. Grab aims to bring digital literacy and greater inclusion to 3 million South-east Asians by 2025 through partnerships with governments, private companies and non-profit organizations. Microsoft's Digital Literacy certification programme will be made available to Grab driver-partners through GrabAcademy, the training platform for Grab drivers across the region. The company has also partnered with Microsoft to launch a programme that creates pathways for Grab driver-partners to pursue tech-enabled careers. With support from Generation: You Employed, a global 'skilling-to-employment' non-profit organization, the programme will include a practicum-based curriculum, and Grab driver-partners can receive certification, tech skills and matching for interviews in technology roles across companies in Singapore.

[Postmates: Partnership for career support](#)

Postmates is expanding partnerships that create opportunities for upward mobility. In partnership e-learning platform edX, it is offering free online access to seven courses on in-demand subject areas such as languages, project-management, cybersecurity and SQL (Structured Query Language, a data programming language). In addition, following a pilot with Jewish Vocational Service (JVS), it is widening access to free in-person job search accelerator programmes in San Francisco and in Los Angeles via JVS SoCal. The programmes offer individualized job search services to help fleet members develop skills (across marketing, design, Custom-

er relationship management and other focus areas) that aid placement in full-time employment opportunities. Postmates is now extending this programming to regional job-placement organizations in Chicago, Miami, and New York.

[Uber: Arizona State University partnership in the US](#)

In the US, more than 250,000 Uber drivers, Uber Eats delivery partners, and their family members are eligible for full tuition coverage at Arizona State University. Eligible drivers and delivery partners can take online classes towards one of 80+ undergraduate degrees through ASU Online, or certificate courses including entrepreneurship or English as a second language. In addition, all eligible drivers have the option to transfer tuition coverage to their spouse, domestic partner, child, sibling, parent, legal guardian or dependent. In order to be eligible, drivers and delivery partners need to have completed more than 3,000 trips, and hold Gold, Platinum or Diamond status in Uber Pro, a program designed to recognize drivers' commitment and high-quality service. Drivers remain eligible for tuition coverage for as long as they maintain Gold, Platinum or Diamond status, and for an additional 3-month grace period—tuition for all courses started while they are eligible will be fully covered. Tuition costs after scholarships and financial aid are fully-funded by Uber.

Voice and participation

[Deliveroo: Rider Forums to share ideas and feedback](#)

Deliveroo has established Rider Forums in certain European markets to put riders' voices at the heart of the company's decision-making. The Forums give riders the opportunity to share their ideas and feedback directly with Deliveroo. In France, for example, 25 Rider Advisors are elected to the Forum by their fellow riders and are appointed for a maximum of twelve months. They meet every three months to discuss a range of issues that affect riders in France, including rider safety, kit design and rider benefits. Riders receive a quarterly stipend for their contributions and Deliveroo also covers any food and travel related expenses for attending Forum meetings. Beyond the Forum, Deliveroo regularly hosts Rider Roadshows and other events to meet with riders in person.

[Uber: Panels of peers for appeals against deactivation](#)

Uber deactivates drivers' accounts in the event of serious violations of the applicable terms and conditions (including its community guidelines). In a number of markets, including New York City, France, and the Netherlands, the company has created Driver Appeals Panels, where a driver can appeal the decision to a panel of their peers. In New York City, Uber's deactivation appeal programme was developed with the input from the Independent Drivers Guild, a Machinists Union affiliate, and hearings are facilitated by The American Arbitration Association (AAA), a not-for-profit, public service organization. Other drivers will hear the appeal, as well as Uber's reason for taking the decision, before making a recommendation on whether they should be allowed to access the app. In France, Uber has set up an Advisory Appeals Committee. Composed of drivers from the Uber network, the committee

reviews the reasons that led to the deactivation of a driver's account and votes a proposal to reactivate the account or not. Uber has consistently followed the driver appeal panel's recommendation for the past two years.

Data management

MBO Partners: Compliance documentation and education

As part of the enrolment process, MBO collects information about the nature of an independent's work, financial history, business structure, and upcoming client engagement. This

information is used to form a "compliance file" that can prove valuable to both worker and client. This file is documented and updated throughout the individual's lifetime of engagements with MBO and is portable from project-to-project, a valuable savings of time, effort and cost to both buyer and supplier. Should an individual not meet the qualifications to work as an independent, MBO provides coaching and guidance, ranging from content and virtual education to custom consultation, enabling workers to build their skills, knowledge and bill rates to increase their attractiveness to the market. If a worker is classified as an employee, MBO works to make sure all minimum entitlements are adhered to.

Conclusion

The platform economy is rapidly expanding into new tasks and sectors and platform work is likely to play a growing role in the new economy. As structures within companies are becoming more fluid as work becomes more project-oriented, there is an increasing trend towards bringing in independent expertise as needed, in addition to contracting out certain functions. Traditional employment and independent work may increasingly intersect, and the distinctions between the platform economy and the gig economy more broadly may also erode as the staffing industry shifts towards platform-based models.

Workers will increasingly move between traditional employment and work in the gig economy, including platform work, over the course of their careers—and may also combine these forms of work at times—depending on their needs and preferences and on those of employers. Already, based on one estimate, 48% of US adults report having worked as independents at some stage.²⁹ Potentially even more radically, the company of the future might consist of a small core of strategists and curators drawing on a 'human cloud' of freelance workers and on AI.

These possible futures make it critical that we prepare adequately and plan in advance good outcomes for workers and business alike. There are a range of opportunities. The expansion of platform work could offer benefits in terms of

greater flexibility for both companies and workers, resulting in improved employment and economic efficiency. Platforms could also be part of the solution for economic revival in marginalised communities and redeploying workers into new types of work as certain traditional jobs disappear as a result of automation.

However, there are also challenges that require preparation and visionary leadership by business and government. For example, if the challenges posed by platform work for work quality and social security are not addressed, the expansion of this type of work could also lead to increased precarity and insecurity for workers. Companies will need to ensure that platform work intermediaries are meeting necessary standards. Regulation will need to evolve to appropriately balance the risks and rewards of platform work. And work/services platforms themselves will need to ensure that they are leading on their societal and stakeholder responsibilities. Establishing principles for good platform work, and finding practical ways for these to be implemented, is therefore necessary not just for the digital work/services space but for the new economy in general. This whitepaper and the Charter of Principles for Good Platform Work are a starting point for a broader initiative to manage the challenges and opportunities of the evolving world of work.

Notes

- ¹ SIA 2019, p3
- ² SIA 2019, p16
- ³ OECD 2019, p4
- ⁴ McKinsey Global Institute 2016, p8
- ⁵ Eurofound 2015, p60
- ⁶ SIA 2019, p3
- ⁷ SIA 2019, p16
- ⁸ SIA 2019, p3
- ⁹ Ibid.
- ¹⁰ SIA 2019, p16
- ¹¹ SIA 2019, p3
- ¹² SIA 2019, p16
- ¹³ Prassl 2018, p17
- ¹⁴ OECD 2019, p4
- ¹⁵ Ibid.
- ¹⁶ Heeks 2017, p5
- ¹⁷ <https://qz.com/1647247/more-americans-are-driving-taxis-thanks-to-uber-and-lyft/>
- ¹⁸ McKinsey Global Institute 2016, p8
- ¹⁹ Huws et al 2017
- ²⁰ European Parliament, 2017, p63
- ²¹ Berger et al, p47
- ²² CEPS 2018, p61
- ²³ European Parliament, 2017, p11
- ²⁴ World Economic Forum, Future of Jobs report
- ²⁵ <https://www.ft.com/content/c5241924-f421-11e9-b018-3ef8794b17c6>
- ²⁶ SIA 2019, p32
- ²⁷ CEPS 2018, p61, Reder et al 2019
- ²⁸ ILO 2016, p247
- ²⁹ MBO 2019 p4

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