



POLICY BRIEF

Migration and the Platform Economy

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EXECUTIVE SUMMARY

Much is said and written about the platform economy with many reports and studies highlighting that the majority of jobs will be freelance and platform-based within a few years. In this briefing we look at what the platform economy is, and underline that migrants make up a large percentage of the workers in this sector. Third-country nationals cannot get locked in a technology-facilitated parallel economy which leads to unstable incomes, limited training and social isolation. The COVID-19 crisis has led to rising unemployment and the recovery is likely to be characterised by increased labour market flexibility.

Significant demand remains in some sectors - for both low and high-skilled workers - and the platform economy can help in turning black jobs white and integrating migrants into host country labour forces. Work permits should be granted to migrants where jobs are available, while efforts should be made by all stakeholders to build trust in the platform economy through collaboration and the establishment of a Code of Conduct.



CONTEXT/BACKGROUND

In this section we specify what the platform economy is, the role that is played by digitalisation, and the increased flexibility that is being demanded by employers and workers. The result however is increased instability and migrants are most impacted by this.

What is the platform economy?

To fully explain the context to the platform economy it is important to first specify what it is, since there is currently a great deal of confusion around the term. In its broadest sense, the platform economy can be defined as economic activity facilitated by technology. Yet since most jobs today have a digital element, this can be deemed too vague. Rather, the platform economy can be described as the digital marketplaces and platforms which allow people to buy, sell and share goods and services.

Such platforms link supply and demand. For example, consumers wanting food delivered to their home or office can be connected with restaurants and delivery drivers over an app. Similarly, people wanting their grass cut, their dog walked or a car to drive them into town can be connected with people who are willing to supply these services over a platform. In turn, these platforms like Upwork, Uber, Yandex Taxi, Aliexpress, Foodpanda and Wolt take a fee or a share of money earned in the transaction.

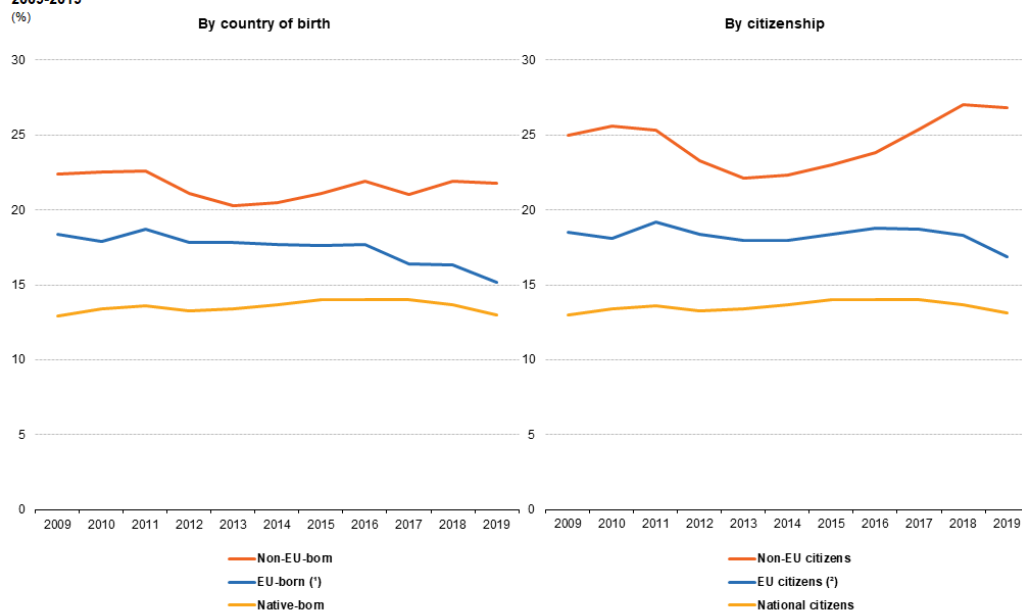
Research states that the majority of jobs will be freelance (independent people hired to work for different companies on particular assignments) and based around platform economy work by 2027¹. This means the traditional relationship, whereby an employer pays an employee an amount of money in exchange for an exclusive agreement to work 9 to 5 five days a week, is changing. Both workers and companies are starting to want more flexibility. Individuals want to have more choice in when to work, and where to work, while combining different roles. Simultaneously, employers want to hire the specific skills that they need, when they need them, rather than having a large, generalist workforce. Platforms and apps are therefore growing in popularity to bring employers and employees together. This is particularly relevant from a migration perspective, since platforms are increasingly used as a way for migrants to enter the labour market and broader society. There is a direct link between the rise of the platform economy and traditional employment becoming more difficult for migrants to enter in destination countries. This results in Polish plumbers and handymen making money through apps in Western Europe to Uzbekhs driving cars for ride hailing platforms in Russia.

The following EU data is indicative of trends across the Prague Process region. The following two tables show that third-country nationals make up a disproportionately high percentage of the workforce who are involved in temporary and part-time work. These type of jobs are characteristic of the platform economy.

¹ Pofeldt, E. (2017, October 17). Are We Ready For A Workforce That is 50% Freelance? Forbes.

<https://www.forbes.com/sites/elainepofeldt/2017/10/17/are-we-ready-for-a-workforce-that-is-50-freelance/#59274c693f82>

Development of the share of temporary employees in the total number of employees for the population aged 20-64 years, EU-27, 2009-2019



(*) Other than in the reporting Member State.
 (†) Other than national citizens.
 Source: Eurostat (online data codes: ifsa_etpgacob and ifsa_etpgan)



Development of the share of part-time employment in total employment for the population aged 20-64 years, EU-27, 2009-2019



(*) Other than in the reporting Member State.
 (†) Other than national citizens.
 Source: Eurostat (online data codes: ifsa_eppgacob and ifsa_eppgan)



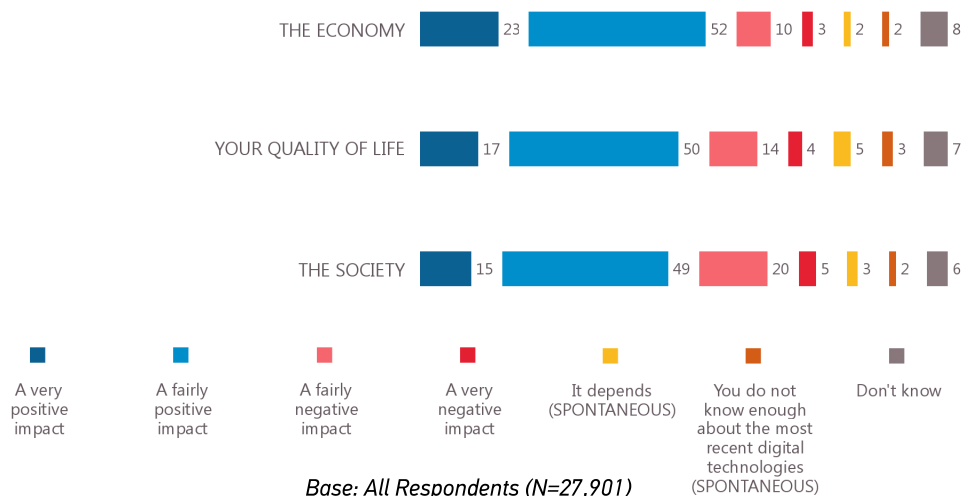


The role of digitalisation

Digitalisation and globalisation are crucial for the platform economy and have contributed to new ways of working and have altered the shape of the labour market. Equally they have affected how we buy, sell and share goods. Where we once had to content ourselves with a classified advert in a newspaper or a card in the window of a local shop, we can now reach a much larger audience through digital means (89% of the EU population have access to the internet, while the figure is 80% in Russia and around 75% in Kazakhstan) for a fraction of the price. Both new and traditional service providers can use platforms to create fresh demand and reach new customers.

Most people across the region also feel that technology is having a positive impact in this regard. The following graph shows that the majority of citizens feel that technology has had an overwhelmingly positive impact on the economy, society and the overall quality of life².

QD1 In your view, what impact do the most recent digital technologies currently have on: (% - EU)



The platform economy is having an impact on society - affecting the world of work as well as how we buy and sell things and services - but legislation, rules and practices are struggling to keep up. These are geared towards a traditional relationship between an employer and an employee, as well as buyers and sellers having a direct relationship. As a result, current laws can often create barriers and prevent the development of the sector while failing to provide the necessary protection for workers and individuals. Workers in the platform economy can often find themselves in a no-man's land where they do not have the social safety net of a regular job and platform companies state that they are not an employer, but rather a technology provider who should not assume any rights or responsibilities towards platform workers.

It is vital that the platform economy should not be a "parallel economy" or something shady: rules are needed to make sure that taxes are paid, consumer protection is upheld and employment conditions are fair. In countries where technology usage and digitalisation are high (for example Estonia), adaptations are being made and policy is being updated to meet

² Eurobarometer. (2017). Attitudes towards the impact of digitisation and automation on daily life.

https://anis.ro/wp-content/uploads/Eurobarometer_Atitudes-in-EU-towards-Impact-of-Digitalization_2017.pdf

the new reality. This takes the form of e-invoicing, declaring tax electronically and payments being made and allowed over e-platforms, for example. In countries where this is not the case (in for example Tajikistan and Kyrgyzstan) workers and citizens are at a disadvantage. Simplifications facilitated by technology and digitalisation are extremely relevant for migrants since they often represent the elements of society who are most at risk.

Globalisation, technological advances, and shifting norms and values are reshaping the way we work. Task-based employment accessed through websites and apps such as Uber, Bolt, Yandex, Yemeksepeti, Delivery Club, BiTaksi and Foodora are used by more and more migrants to earn money. The platform economy may be a double-edged sword for many migrants, though. They offer a quick pathway to self-sufficiency, yet come with risks of unstable income, limited training, and social isolation - all of which could hinder the integration process in their destination country.

Increased flexibility and instability

A growing number of firms now rely on a pool of external service providers available 24/7 to top up their own workforce at peak periods or to bring in missing expertise for a limited period of time. The employment market of today is becoming more and more reliant on platform economy workers: individuals who rely on internet-enabled platforms to find one-off tasks - from translation to delivering food and construction work - for all or part of their income.

Roughly 40% of executives across the Prague Process region expect to employ more freelancers than workers on a fixed contract over the coming five years. Furthermore, 50% of business leaders think that the corporate adoption of platforms to find workers would be a good thing³. The COVID-19 crisis has reinforced this development, so the issue is relevant for high-skilled (people with a university degree and/or specific knowledge and skills) and low-skilled (individuals with no qualifications, skills or training) migrants alike. Both groups need to adapt to this fact. A similar change in previous economic downturns is noticeable: the number of freelancers and the size of the platform economy has increased as a result of every economic crisis since 1991⁴.

POLICY OPTIONS

In the following section we move from the background to look at some of the policy options available to governments. Integrating migrants - and facilitating their entry into employment, in particular - through the platform economy will be an important focus for policy-makers and opinion-formers across the region. Migrants are finding it increasingly difficult to enter labour markets in destination countries and there is the hope that technology will make it easier for them to find jobs. Technology platforms should make it simpler for migrants to match their skills with the shortages that exist in destination countries. This will help third-country nationals already in destination countries, but would-be migrants need

³ BCG Henderson Institute. (2019). The New Freelancers: Tapping Talent in the Gig Economy.

<https://www.bcg.com/publications/2019/new-freelancers-tapping-talent-gig-economy.aspx>

⁴ Roland Berger. (2020). The Future of the Gig Economy.

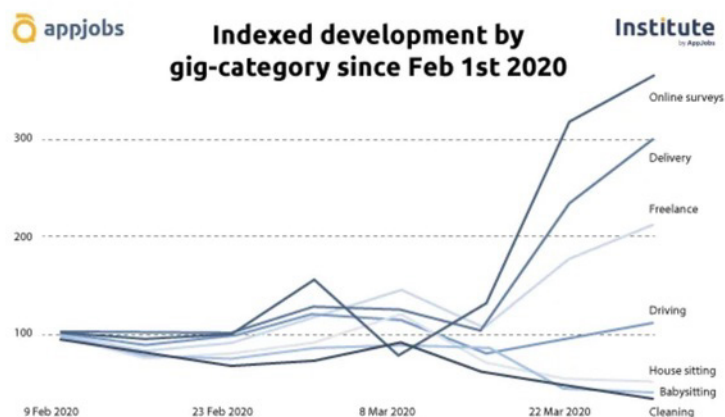
<https://www.rolandberger.com/en/Point-of-View/The-future-of-the-gig-economy.html>



the work permits that will allow them to enter destination countries where labour shortages in specific sectors exist. As such, the benefits for would-be migrants are more limited in the short run. Over the longer term, however, technology and the platform economy will help to highlight skills shortages where they exist. National governments in destination countries are therefore likely to facilitate migration to meet companies' labour shortfalls - particularly if the local population cannot/does not want to fill the vacancies. Economic growth will depend on increased migration under these circumstances.

An enduring problem across the Prague Process region is that employers are looking for specific people with a particular background, qualifications and training. They know that employees who have come through their local/national system have an education, professional skills and an all-round experience that they can utilise. A German manufacturer of automotive parts knows what they will get if they employ a German apprentice who has been trained through the national system. However, when a potential employee comes from Serbia or Turkmenistan and their skills, education and knowledge are unknown, or not recognised in the destination country, then the willingness to offer employment is significantly reduced. When combined with limited language and cultural knowledge, the situation is made worse. Strict labour laws also make it more difficult for migrants since employers do not want to be saddled with the wrong worker that they subsequently cannot get rid of.

Since the Coronavirus pandemic has amplified many of these issues - and that resulting unemployment means that there are more workers (both local, non-local and third-country nationals) to choose from - the platform economy should be supported as a legitimate vehicle through which migrants can find sources of income and make money to support themselves and their families. Demand is still strong in a number of sectors, including technology services, programming, website development and e-commerce at the high-skilled end of the spectrum. When we look at lower-skilled jobs, medical support, the care sector and deliveries are still growing. The demand for food deliveries is set to increase by 15% over the next three years, for example⁵. The following graph displays some of the latest trends.



⁴ Deloitte. (2019). Delivering Growth: The impact of third-party platform ordering on restaurants.

<https://www2.deloitte.com/content/dam/Deloitte/uk/Documents/corporate-finance/deloitte-uk-delivering-growth-full-report.pdf>

A force for good or a force for bad?

Some feel that the platform economy is fantastic because it allows immigrants - whether third-country nationals or EU citizens moving to another Member States - to arrive in a country and begin earning money/working almost immediately. On the other hand, there is concern held by some that the platform economy leads to more vulnerability with long hours, no job security and weak ties to social welfare systems. Currently, platform economy workers fall outside national laws and social safety nets in many countries because platform companies are not classed as employers and therefore the normal labour rules do not apply.

At worst, the platform economy could push migrants further out to the fringes of economies and societies. Stripped of labour rights and social protection - while unable to gain more skills, and locked out of social capital - they would make the ideal scapegoat for social tensions around growing inequalities in society.

At best, the platform economy could help migrants struggling to find a way into the highly regulated world of traditional employment. These migrants could download an app, sign up, answer a few qualification questions and start accepting jobs almost immediately. It could also allow them (and nationals, if they so choose) to enjoy flexibility, autonomy and connect with a transnational client base - provided that they have the necessary digital and entrepreneurial skills. This would also mean that they start earning money and do not need state benefits and allowances.

Something to be supported

At the European Union level, the European Commission issued a Communication entitled "A European agenda for the collaborative economy" in 2016⁶. This describes the platform economy (the term "collaborative economy" is used interchangeably with "platform economy" in the context of this Communication) as a new way to offer and use products and services through online platforms, provide new opportunities for everybody, as well as offer creative and entrepreneurial people the opportunity to develop new business models.

Back in 2018 a Eurobarometer poll⁷ showed that more than half of all EU citizens knew about the platform/collaborative economy, with one person in four already a user (up from one in six in 2016).

Among those who have used platforms to access services, over half have accessed these in the accommodation (57%) and transport (51%) sectors, but relatively few Europeans have accessed professional services (9%) or collaborative finance (8%). Popular accommodation platforms are Airbnb, Flipkey Russia and Vrbo. When it comes to transport Uber, Yandex and BiTaksi are popular examples.

Interestingly, among those who have used services offered via platforms, Eurobarometer found that nearly nine out of ten (88%) would recommend them to others. Furthermore,

⁶ European Commission. (2016). COM(2016) 356 A European agenda for the collaborative economy.

<https://ec.europa.eu/transparency/regdoc/rep/1/2016/EN/1-2016-356-EN-F1-1.PDF>

⁷ European Commission. (2018). Flash Eurobarometer 467. "The use of the collaborative economy".

https://data.europa.eu/euodp/data/dataset/S2184_467_ENG



only 6% of Europeans have offered services over a platform. Despite knowing about the platform economy it is seen as something secondary where goods and services can be bought, but it is not a natural choice for many in the Prague Process region. Most people still prefer traditional methods of employment and working for a single employer on a contract basis. This shows that the potential scope for development and growth is significant, however. Younger people are much more attracted than older people to the opportunities presented by the platform economy, and this was highlighted in a JRC Future of Work study. Similarly, a study showed that Russians born after 1980 value experiences, mobility and self-expression more highly than status and consumption. This is reflected in their increased favourability towards platform economy work⁸.

While the platform economy should be encouraged, the European Commission underlined that the most important issues to focus on are market access requirements, consumer protection, liability, trust in new services, labour law and taxation questions.

Conditions of workers in the platform economy

While supportive of the platform economy, and the opportunities that it creates, legislators are mindful that with new forms of work must come modern and improved forms of protection, including for those working via online platforms. With this in mind, the European Commission is planning to launch a new initiative on improving the working conditions for platform workers. This was mentioned in the European Commission Communication "A New Industrial Strategy for Europe" in March 2020⁹. Many other countries are looking at the platform economy from a similar standpoint. Doing so will have a significant impact on migrants since they make up an important part of the platform economy, as Eurostat data shows.

In parallel with this, the European Commission has proposed a reform initiative for an EU minimum wage. The aim is that by 2024 all workers in the EU should earn a fair and adequate wage, no matter where they live in the EU.

Make black jobs white

At present, there are a number of jobs - from cleaning and building work to babysitting and gardening - which are paid with black money and are part of the shadow economy. This means that workers do not have any social provisions, sick pay or pension cover. It also means that potential tax money does not enter state coffers to pay for schools and hospitals. Rather than being seen as perpetuating this reality, the companies operating within the platform economy can actually address these concerns.

Some countries have already introduced schemes designed to make certain types of jobs (like building and cleaning work, for example) legal and bring these jobs out of the shadow economy and provide workers with a safety net. In Sweden, a person who hires someone to do ROT (Repairs, Conversion, Extension) or RUT (Cleaning, Maintenance and Laundry) work

⁸ TIARCENTER and the Russian Association of Electronic Communications. (2020). Sharing Economy in Russia 2020.

<https://tiarcenter.com/en/sharing-economy-study/>

⁹ European Commission. (2020). COM(2020) 102 "A New Industrial Strategy for Europe."

https://ec.europa.eu/info/sites/info/files/communication-eu-industrial-strategy-march-2020_en.pdf

may get a tax reduction in the form of a ROT or RUT deduction for the labour cost. Similarly, in the Belgian regions, individuals can pay for washing, ironing and cleaning services via “Titres Services” which are subsidised by the government and provide decent condition working for employees (including social insurance cover, holiday pay etc.)

Moreover, activities closely related to the domestic or private sphere - such as domestic and repair services as well as ride sharing - were often paid for in cash (or kind) and undeclared. The marketisation of such work through digital marketplaces, however, means full traceability. Furthermore, since digital platforms are facilitated by electronic payment systems there is an increased opportunity to bring undeclared work out of the shadow economy.

Taxation

In addition to heightened transparency, and turning black jobs white, there are amendments that could be made in three areas related to tax that governments could look at to facilitate the platform economy.

Firstly, governments could look at the level at which private individuals can help each other, and do a range of jobs, without incurring employer contributions. In some countries, there is no scope for this at all while in others individuals can earn up to a few thousand Euros every year. These thresholds could be increased to encourage the platform economy.

Secondly, legislators could investigate allowing platform economy workers a tax exemption on the first tranche of income they make each year, to make platform economy work more attractive and help migrants enter the workforce. The argument is also that this could bring the platform economy in line with exemptions available for renting out your home or running a hobby activity, which already exist in some countries.

Thirdly, there should be no need for a person who sells second-hand items they no longer need over a digital platform to pay tax on the money they earn. This helps people to find a new home for unwanted items. The buyers also benefit from these goods and save money, while from an environmental and sustainability perspective items are not thrown away to cause pollution and harm nature. Platforms therefore play an important part in contemporary society moving more towards a circular economy (an economic system aimed at eliminating waste and reusing finite resources) and a sustainable model.

Reduce or stop migration?

At the other end of the spectrum, an option available to politicians and decision-makers is to decide that COVID-19 has created such instability and unemployment locally that all immigration should be reduced or stopped completely. While this would be limiting for countries on economic, social and political grounds, it is a view that is growing in popularity in many quarters. Some feel that since there are huge numbers of high-skilled and low-skilled workers looking for jobs, then locals should be prioritised. An integral part of economic growth in the good times, migrants are now seen as an inconvenient problem for many destination and transit countries.



The Coronavirus crisis has made it very easy for countries to close borders and this trend could be extended well beyond the life of this current pandemic. It could also see politicians and companies focusing on employing nationals while also investing more in machines and automation to carry out low-skilled jobs over the medium term.

IMPLICATIONS AND POLICY RECOMMENDATIONS

With the policy options explained, it is important for politicians and decision-makers to realise that the platform economy is here to stay and that it is expanding at a significant rate. Annual growth rates stand at 20% in Europe and the platform economy is estimated to be worth USD 335 billion globally by 2025¹⁰. It is therefore advisable for governments to control it and use the platform economy as a catalyst for opportunity, jobs and growth. In times of economic instability following the COVID-19 pandemic, the platform economy should be harnessed as part of the solution, rather than part of the problem.

So, what policies can promote the platform economy but ensure that it benefits the wider society as well as the migrants themselves? We would suggest providing work permits to migrants; ensuring that the same rules apply to the platform economy as the regular economy; and promoting initiatives to build trust.

Provision of work permits and a safety net

Governments should ensure that migrants receive work permits - with minimal red tape - and therefore allow them to work in the platform economy in destination countries where there is a proven need. This should apply to third-country nationals and permit them to work in the platform economy, while meeting the needs of employers. These work permits should not be based on a system of quotas, but rather on the economic need in the relevant country.

Although politically sensitive in some countries, offering unemployment insurance for migrants would be helpful. This would allow migrants to cover very basic living costs if they are between jobs. In addition, guaranteeing access to health care and education is critical to allow migrant parents to work while their children are taken care of and fed.

A common concern expressed across the Prague Process region is that new opportunities for migrants necessarily mean a negative impact for local workers. Despite the fact that this rhetoric is very popular across a number of countries, research shows that the evidence of migrants negatively affecting natives' employment chances is extremely weak. One of the reasons is that foreigners and locals usually bring different skills to the labour market. In many cases migrants want, or are prepared, to do jobs that the local population are not interested in. Platforms merely provide the opportunity for workers to find employment more quickly and efficiently.

Economists and researchers have clearly demonstrated that migrants can provide significant growth opportunities for host countries. With the platform economy bringing about rapid changes to the labour market, policymakers must think differently in order to take full advantage of these.

¹⁰ PYMNTS. (2019). Platform Economy's Strong Growth, Based On Trust.

<https://www.pymnts.com/today-in-data/2019/platform-economy-payments-commerce/>

The same rules should apply

The platform economy needs to follow the same rules of the game as the regular economy. This entails taking on the same rights, rules and responsibilities from paying taxes to making social contributions and providing good employment conditions. Where platforms are providing jobs, supplying uniforms and paying benefits then they should be classified and treated as an employer. They should not hide behind the claim that they are just a technology company in an attempt to avoid their responsibilities. However, where platforms are simply providing a digital marketplace for potential employees and employers to find each other, then this connection function should be simply seen for what it is.

Countries need to be firm and establish that the platform economy needs to be treated in the same way as the regular economy in order to ensure a level playing field, but also to prevent uncertainty and platform workers - many of whom are migrants - being put in a precarious or negative situation.

Building trust

In order to address the knowledge, trust and perception deficit which currently exists about the platform economy it will be important for legitimate actors in the sector to cooperate with national public authorities (e.g. the tax authority, the employment agency and trade unions) as well as politicians in local and national government. Together they should develop a Code of Conduct covering worker's rights and working conditions as well as taxation and administrative matters. Such a charter could be tailored to the needs of the national market and act as a trust mark for actors who meet the required standards. In turn, this would increase migrants' trust in the platform economy, as well as that of businesses and consumers on the local market. Information and training sessions could also be arranged in order to help educate migrant workers as well as employers.

This Code of Conduct should be independently audited on a regular basis in order to inspire confidence and be respected by all parties. Operators who do not consistently meet the desired standards should be sanctioned and even have their accreditation removed and be barred from the scheme if they fail to address shortcomings within an appropriate time-frame.

A good example of a Code of Conduct exists in the UK and was adopted by members of the trade body "Sharing Economy UK". In effect, a Code of Conduct should become a badge of honour for legitimate operators who follow the rules and should attract more business, sign-ups and users. In turn, this Code of Conduct should help to inspire trust in the whole sector and distance the current platform economy from the mistakes of the past. These include treating and paying workers badly, paying little attention to local policy and customs, as well as not always following national laws.

Linked to the previous point about a Code of Conduct, the establishment of a trade association at the national level for platform economy operators would be equally important. The platform economy is characterised by an increasing number of players, with a significant number of start ups. They often work in isolation, confronting the same issues and even occasionally repeating the same mistakes. This is very inefficient and wastes precious energy and time. The establishment of a trade association would help all parties involved to shape the future of the sector and solve problems collaboratively.



Both establishing a Code of Conduct and the formation of national trade associations would help in raising the image of the platform economy, increasing trust and helping it becoming accepted as an extension of the regular economy by migrants, local workers, businesses and decision-makers.

In sum, the platform economy offers new routes for migrants to enter the labour market in destination countries while lowering the barriers to entry and offering them more flexibility. This should be facilitated by governments and policy makers since there is a need and demand will likely increase after the COVID-19 crisis passes. At the same time, legislators need to ensure that migrants are protected from a precarious existence characterised by limited rights, volatile incomes and no social safety net. If not, migrants will remain on the fringes of society with little chance of entering the regular economy.

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