



Comparative Report THE ANALYSIS OF THE RESEARCH SURVEY





COMPARATIVE REPORT ON

THE ANALYSIS OF THE RESEARCH SURVEY OF THE PROJECT WORKER PARTICIPATION IN GIG ECONOMY

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The emergence of the gig economy and the development of atypical forms of employment are changing the concept of the worker, as we know it so far. Therefore, the participation of policy makers and trade union involvement is necessary to ensure effective participation of workers in the new forms of employment that are established by the implementation of the gig economy.

A concept of the gig economy that alludes to a situation of occasional workers, who try to implant a labour model that could be compared with the work of free-lance or autonomous (or "false autonomous") with contracts of short duration to take charge of specific tasks within a project.

Thus, the project **Worker Participation in Gig Economy** aims to expand the influence of workers in strategic decisions of companies by improving knowledge, cooperation capacity and joint action, and to increase the knowledge of all participating organizations to influence the adaptation of company policies to the challenges of the modern labour market in this gig economy. To this end, a *Research Survey* has been developed, whose valuable results to be analysed in this Report.

REPORT OF THE ANALYSIS OF THE SURVEY DATA: "GIG ECONOMY – THE INFLUENCE ON THE PARTICIPATION OF THE WORKERS"

To elaborate this *comparative report*, we have started from the reports elaborated by experts of each country participating in this project, and from the surveys carried out on-line in each participating country: Poland; Slovakia; Serbia; Italy; Greece; Belgium; Portugal and Spain.

The aim of the survey was to identify and address current trends in the influence of the development of the gig economy on worker participation. Accordingly, in order to carry out this objective, the *Research Survey* was designed to meet three conditions:

- ✓ it has been done on-line through a dedicated platform with access in the language of each country;
- ✓ contains multiple choice questions;
- ✓ it is divided into three sections: Self-employed, permanent workers (with inhouse recruitment) and employers.

In addition, the following aspects have been evaluated:

✓ The optimism and pessimism of workers and employers in the automotive sector in their employment conditions, in aspects such as:

the reasons for their employment relationship and what it affects their personal life, professional activity and economic situation;

the ways in which you can carry out your work and professional activity: hours of dedication, autonomy, skills, learning capacity, etc.;

the degree of satisfaction in various aspects related to the working life, the professional development and the economic income, or

relations with the employer and permanent workers.

- ✓ The future of the gig economy through the "self-employed" (freelance):

 benefits that this type of employment relationship has for both the workers and the companies.
- ✓ And the needs and benefits of self-employment in the automotive sector:

the need for normative regulation and the integration of these workers into the union movement:

how self-employment affects or would affect permanent workers in the future;

whether self-employment can lead to unfair competition with permanent work and whether it is an option for new graduates to enter the labour market and would provide them with an adequate income.

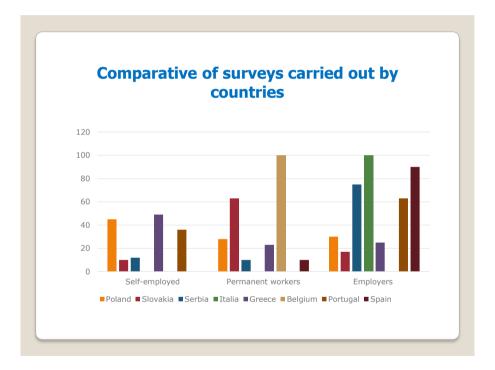
Therefore, we have structured this **Comparative Report** into the blocks that make up the analysis produced by the digital survey design, considering the three types of respondents: employers, self-employed workers and dependent workers.

Data on the personnel surveyed

The largest number of surveys, 48%, were answered by employers, with a similar number of surveys being collected from self-employed workers (29%) and permanent workers (23%).

However, there are differences between countries, as only Poland, Slovakia, Serbia and Greece have answers from all three groups. This situation obviously makes a comparative analysis of all the data difficult.

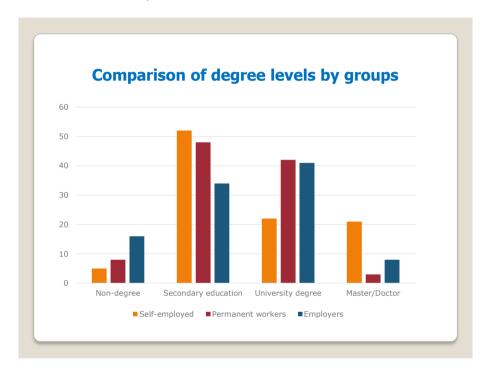
Level of education of respondents



As regards to self-employed workers, more than half of the workers surveyed have a secondary education degree, as opposed to 40% who have at least a university degree; highlighting the very high percentage of workers with a Post University Degree (master/doctor) of the people who have responded to the survey in Greece. In the case of dependent workers, there is a "technical tie" between workers who have a secondary education degree and those who have a university or post-university degree, with more than 45% in each case.

By country, in this group, the cases of Spain stand out, 68%; Slovakia, 80% and Serbia with 100% of people with a secondary degree. In the case of university degrees, the countries with the most respondents are Italy (74%) and Portugal (77%).

Finally, if we refer to employers, one half have a university or post-university degree, compared to 34% who have a secondary degree and 17% who do not have any degree. By country, the situation of Poland is striking, with 93% of people with a university degree and 67% of Serbs in this degree range. For its part, Spain has the highest percentage of people surveyed without a degree, 50% and the other 50% would have a secondary education.



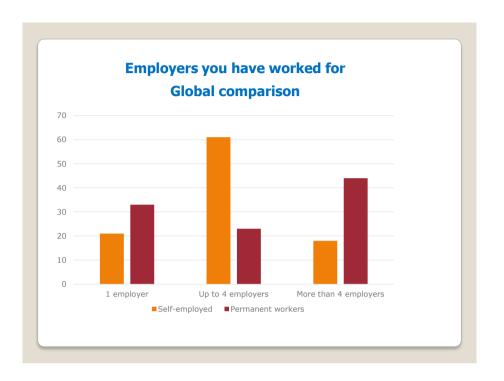
Employers you have worked for

There is no excessive rotation of self-employed workers, most of them being concentrated in a maximum of 4 employers throughout their working life, where 67% in Slovakia and 90% in Serbia stand out; except in Poland, where more than half of the self-employed workers surveyed claim to have worked for more than 4 employers.

Surprisingly, there is a higher turnover among permanent workers, reaching 44% for more than four employers (compared to 23% who would have worked for four employers and 33% who would have always worked for the same employer).

In this sense, if one works for more than four different employers, 100% of Serbia and 63% of Poland stand out, in both cases in companies with more than 250 workers.

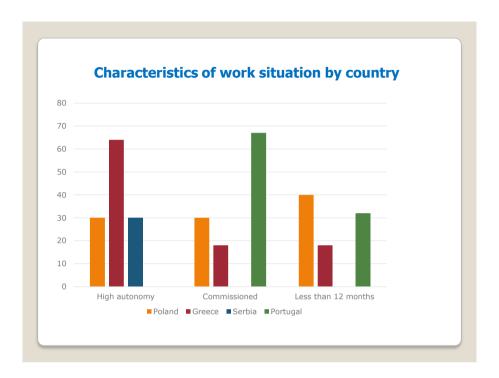
The greatest employment stability is in Spain, where 71% say they have worked for only one employer.



Characteristics of the employment relationship of self-employed workers

In this section of the survey, three characteristics of this employment relationship are analysed: the degree of autonomy, the making of "payments on order" and the contractual relationship with the employer of less than 12 months.

The most widely reported characteristic of this type of work is the degree of autonomy, with 38%; although the other two options are not separated, in excess, in percentages: 35% for payment made by order; and 28% for employment relationships of less than 12 months. The highest percentage reached in Greece for the degree of autonomy, 66%, and the highest for "payment on order" in Portugal, 67% of people surveyed.



Reasons why a worker is self-employed

On this issue, there are two possible options: personal choice and need; with a higher proportion of self-employed workers who are self-employed out of need (55%) compared to those who have chosen that option, 45%; according to the answers given by the self-employed themselves.

These reasons are reversed depending on the country: in Slovakia, Serbia and Portugal 70% claim to be self-employed out of need, compared to more than 60% who have chosen this option of employment relationship in Poland and Greece.

As for the reasons why a worker is self-employed, from the employer's point of view, 46% believe it is a personal choice (100% in Poland, 65% in Slovakia and 50% in Spain); compared to 20% who think it is out of necessity. 34% (60% in Serbia and 67% in Greece) have no opinion on the subject.

What income is for the self-employed

We analyse here, if the retributions received by the independent worker, supposes, for her/him, a primary income or it is a complementary to another that he/she could receive.

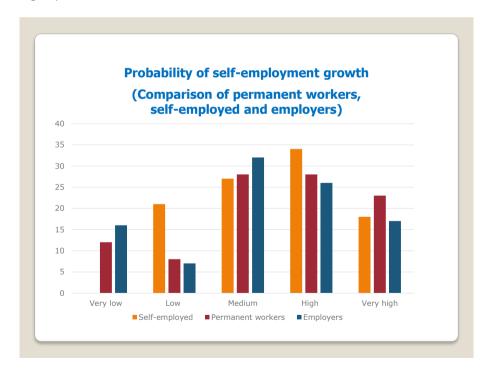
It can be observed that for 75% of self-employed workers, their work represents the basic income of their salaries; being slightly lower than the average of the six countries in which there are answers to this question, in Portugal and Slovakia, with 67% of the answers of those surveyed.

Evaluations of the self-employed, answered by both permanent workers and employers

In the following questions, we attend to the evaluations made by dependent workers and employers on some issues related to the work of the self-employed.

✓ I would prefer to work as a freelancer: thus, 52% of dependent workers would not want to work as a self-employed person, these values being higher in Serbia (90%), Portugal (55%) and Spain and Portugal (60%); while 40% of Slovaks would bet quite a lot on this change and almost 50% of Greeks and Belgians, would opt for the change "partially".

This question answered by the employers means a decrease of the high or very high option, from 52 to 45%.



- ✓ I am afraid to work as a freelancer: this question raises very different answers; although 46% answer that, they are quite or very afraid; 32% are moderately afraid and the remaining 22% are somewhat or not at all afraid of this situation. By country, 80% of Serbs would say they are "very afraid" of such a change and 67% of Belgians are relatively afraid.
- ✓ What is the probability that self-employment will grow: on this question, the vast majority of answers are set to the option that this possibility is high or very high, up to 52%. 27% think that this possibility has a medium certainty and the remaining 20% think that this possibility is low. By country, the option of high or very high is given by 52% in Poland and 67% in Slovakia; while the option of this possibility being low is answered by 60% of Serbs [who, curiously, had shown "very afraid" of such an employment situation, in the previous question].
- ✓ Possibility of self-employment growth: the answers given by the permanent workers reproduce, exactly, the one made by the independent workers: That this possibility is high or very high, 52% (highlighting 80% of Belgium and 70% of Serbia); 28% think that this possibility is average (with higher percentages of Belgium, 66%, and Greece, 55%); and 20% think that this possibility is low or very low.
- ✓ Employers' interest in permanent workers versus the self-employed. 50% of employers admit that they do not care more about permanent workers than self-employed workers, compared to 20% who say they do care more about permanent workers and 30% who maintain an aseptic position on this issue.

Greece is the most aseptic on this issue, with 67% believing that this situation is only half as bad, while Slovakia, with 43%, believes that if there is more concern for dependent workers, and Poland, with 74% and Spain, with 75%, believe that this concern would not be greater for dependent workers, not at all.

Level of satisfaction of dependent and self-employed workers

As for the level of satisfaction, the same questions are asked to self-employed and permanent workers and employers are asked their opinion on the same items, but from their perception, so the answers may not be objective in the latter case.

All the questions raised have multiple answers that must be replied to by assessing whether the level of satisfaction is: low/ quite low/ medium/ quite high/ high.

The topics on which the degree of satisfaction of the worker is evaluated are:

- ✓ working life, in general,
- √ the activities in which he/she works,
- ✓ the number of working hours,
- ✓ the independence of working life,
- ✓ the relationship with the employer,

- ✓ the level of autonomy at work,
- ✓ the creativity one can express in work,
- ✓ the benefits one gets, like: licenses, health insurance, grants,
- ✓ the possibilities of learning,
- ✓ the professional recognition,
- ✓ the income and the security of income.

On these questions, we are going to make a global assessment, highlighting those aspects that stand out or with respect to a country in contrast with the answers obtained in the other countries.

Self-employed workers (with answers from five countries) are quite satisfied in terms of:

- ✓ the number of working hours (62%)
- ✓ the ability to choose working hours (50%)
- ✓ independence in working life (44%)
- ✓ access to social benefits (50%)
- ✓ the income received (60%) and the security of that income (80%)

And they claim to be **moderately satisfied** in:

- ✓ Their working life in general (47%)
- ✓ The activities they carry out in their work (57%)

Other aspects such as learning and professional recognition achieve values of 50% in both cases and for both quite low and quite high satisfaction.

As regards aspects such as the relationship with employer, the level of autonomy and the creativity they have, **it is not possible** to specify a level of satisfaction in relation to others.

Permanent workers (with responses from seven countries) are **quite satisfied** only with the activities they carry out at work (38%) and with their income security (41%) [although on this issue 38% say that their level of satisfaction is quite low].

They claim to be **quite satisfied** with their work life in general (41%) and with their independence in work life (34%).

As for the ability to choose working hours, 45% admit that their level of satisfaction is **quite low**, as well as in terms of income (47% of respondents).

In the rest of the factors analysed, **it is not possible** to specify a level of satisfaction since in all cases they are around 30% for the levels of: quite low, medium and quite high.

Finally, with the perception of **employers** (with answers from five countries) we can see that they believe that permanent workers (the only ones they are asked about) are **quite satisfied** in terms of:

- ✓ working life in general (46.5%),
- ✓ the activities they carry out in work (39%),
- ✓ the number of hours working (35%),
- ✓ the ability to choose working hours (49%),
- ✓ the level of autonomy (61%),
- ✓ the level of creativity in work (40%),
- ✓ access to social benefits (57%),
- ✓ learning (63%),
- ✓ professional recognition (47%),
- ✓ the income received (60%) and the security of that income (60%).

Finally, they perceive that these workers are **very satisfied** with their independence in their working life (38%) and with their relations with their employer (38%).

If we analyse comparatively the answers given by the different groups, we can see that:

- ✓ self-employed workers feel a higher level of satisfaction in their professional activity and in their working conditions than permanent workers;
- ✓ they rate their working hours and their ability to choose the working hours
 they work (with differences of up to 30 points); their independence in their
 working life (with differences of 10 points compared to permanent workers);
 the social benefits they receive (20 points difference) and their income and
 security (with differences of between 30 and 40 percentage points compared
 to permanent workers);
- ✓ permanent workers show only a moderate or quite high degree of satisfaction with their overall working life; with the course of their professional activities; with learning choices and income security; but in all cases with values between 35% and 40% compared to other choice;
- employers' views on the satisfaction of their permanent workers are not at all in line with those expressed by employers.

Most of the aspects analysed are perceived by employers with values that are, with the qualification of a quite high level of satisfaction, with percentages between 55% and 60% (except in the relations with the employer, in the independence of working life and the amount of working hours – around 33%).

Polish employers are the most optimistic in terms of these, subjective, degrees of satisfaction of their employees.

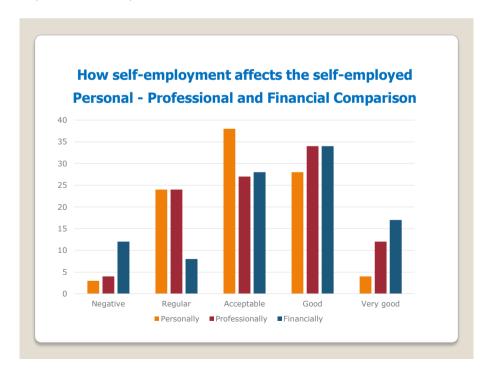
How self-employment affects the self-employed

This question evaluates how self-employment affects them personally, professionally and financially.

The answers given move away from extreme positions (negatively or very well), thus maintaining a neutral line where 39% of answers with the qualification of acceptable stand out. If we add the rating of good, this means that almost 60% of self-employed workers rate their work as "acceptable-good" from a personal point of view. The workers who value this option the most are the Slovaks, with 100%, and the Serbs, with 90%.

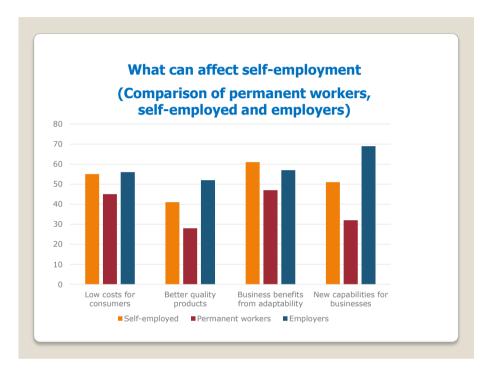
The same assessment can be found if we refer to the professional aspect, although, by country, those who best value this option are Poland, with 57%; Slovakia, with 66% and Greece, with 50%.

Finally, in the financial evaluation of this type of work, the option of "regular" loses weight, which drops from 20% to 8%, increasing the option "negative" by almost 10 points. The most celebrated option personally and professionally, "acceptable-good", increases to 63% and the option of very good soars to 17%: this could be indicative of a valuation in respect of income received that would be satisfactory. By country, those who value this option best are Poland, 62%, Slovakia, 66% and Serbia, 60%.



Valuations on what self-employment can bring

In this section, we are going to evaluate what self-employment can create in a series of aspects, from the point of view of each of the three groups surveyed: self-employed workers, permanent workers and employers.

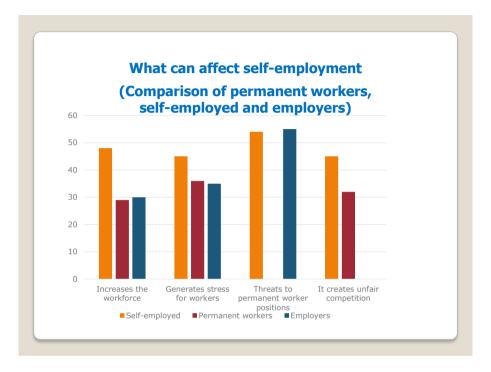


The questions proposed are posed with five alternative answers that assess the **degree of agreement** with each one of them: not at all agreed; somewhat agreed; partly; quite a lot and a lot.

- ✓ Low transaction costs for consumers
- ✓ Create better quality products
- ✓ They bring benefits to companies due to their adaptability
- ✓ It means that companies can acquire new skills
- ✓ Can increase the workforce
- ✓ It can threaten permanent workers' jobs
- ✓ Can create unfair competition

In addition, there is a question, only for the self-employed, which asks whether self-employment generates anxiety about the working conditions they have and about the workers

In the comparison that we are going to make, we establish the values of partly agreed, which is the one that appears with the greatest impact in the surveys carried out.

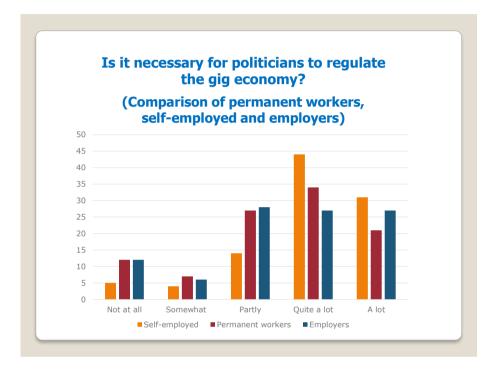


- ✓ In all opinions, the highest rankings on each of the issues proposed in the survey are given by the employers and, in a similar situation, by the self-employed.
- ✓ The discrepancies between employers and self-employed workers are established when talking about the consideration of the increase in the workforce (48% for self-employed workers and 30% for employers); and whether anxiety is generated about workers and employment conditions (45% for self-employed workers and 35% for employers).
- ✓ The opinions of permanent workers are in percentages between 30 and 35% (except opinions on the generation of lower costs for consumers and on the business benefits of adaptability).

Regulation and participation of self-employed workers

In this section, we analyse two issues. On the one hand, the opinion (expressed with the level of agreement of the respondents) on whether policy makers should regulate the gig economy and support the self-employed. On the other hand, whether the self-employed should be involved in the activity of the trade unions.

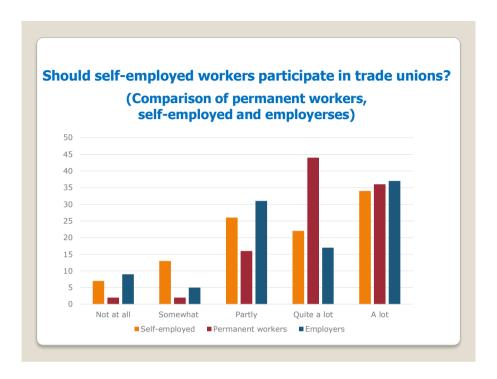
- ✓ Need for political regulation of the gig economy
- ✓ A large majority of the self-employed surveyed (44% think quite a lot and 31% think a lot) believe that it is necessary for politicians to regulate the gig economy; with 100% of the respondents in Portugal, 84% in Greece, 74% in Poland and 67% in Slovakia.



On the same issue, 55% of permanent workers (20% less) think the same as the self-employed; the highest percentages being in Greece (73%), and Poland and Serbia with 60%.

The employers' opinion is similar: 54% believe that this regulation is necessary, although it should be borne in mind that this option is greatly increased by the 100% of answers in this sense given by the Spanish employers [without the Spanish answers, the percentage would be reduced by 20 points, in which case the indifferent option prevails over this regulation].

✓ On the need for self-employed workers to participate in trade unions 56% of self-employed workers believe that they should participate in union activities, although this percentage drops to 17% if we do not count the responses given by the Greeks and Portuguese (from 84 and 100%). The percentage of self-employed workers in the other countries on this issue is in the indifference about it (40% of them think in that sense).



On the other hand, the survey shows a greater awareness of this issue among permanent workers: 80% think that the participation of self-employed workers is quite or very necessary and only 4% think that it is not necessary. By country, Serbia, with 50% of "partly" responses, is the only one to move away from this majority option.

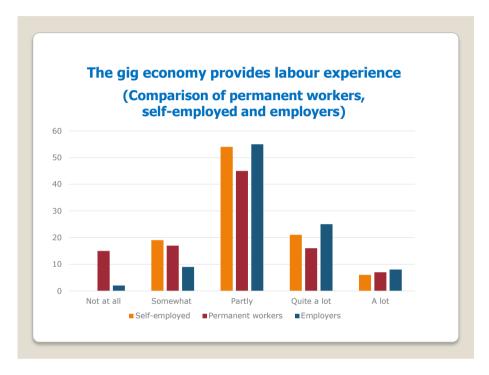
Finally, the responses given by employers are, in percentage terms, more similar to those of the self-employed (54% in favour of such participation as opposed to 56% of the former). Once again, the 100% contribution by Spaniards on this question increases "unrealistically" their percentage, as it would be 22% without Spain; the indifferent option then predominates with 30%.

The gig economy as an instrument to incorporate new graduates into the labour market

In this last section of the *Research Survey*, we analysed three questions, in which we asked the level of agreement with three statements aimed at assessing whether the gig economy is valid to provide experience to workers in a rapid manner. On the other hand, we evaluated two aspects of the gig economy with the new graduates: whether it can provide them with an income in the labour market and whether the income they would receive would be sufficient to establish adequate living conditions. The answers are evaluated by considering the degree of agreement shown by the participants with the statement of each one of them.

✓ The gig economy is a fast way to get work experience.

The answers given by the self-employed do not allow for a definitive assessment, as 54% said they agreed with the option "partly", with the options "somewhat" and "quite" occupying the same percentages, 20% each. Poland, with 40%, and Slovakia and Serbia, with 33%, are the ones that bet more on the fact that the gig economy is a fast way to get work experience.



Again, the option most valued by permanent workers is the "halfway" option with 46%; although 30% of them believe that the gig economy does not provide a work experience, compared to 23% who believe "quite a bit or a lot" that it does. It is the Belgians who bet more on the option that it does provide that work experience, with 66% of responses in this regard. Portugal, with 61%, and Serbia and Spain, with 45%, are the ones who think that they do not provide that experience.

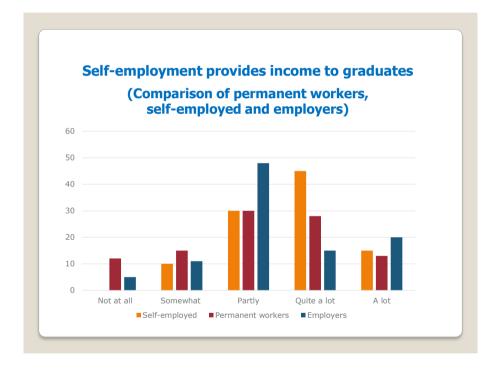
Employers also maintain a position on this issue that does not specify a preference on the question posed, as 55% agree "partly". However, in this group, the option of "quite a lot" prevails, with 32%, as opposed to 11% who obtain the option of "nothing-somewhat". Spain (100) and Serbia (80%) are the most neutral countries in this issue and Poland, with 86%, who believes "enough or a lot" that if it provides that work experience.

✓ Self-employment provides adequate income for graduates entering the labour market.

The majority of self-employed workers, 60%, believe that it provides an adequate income to graduates entering the labour market, compared to 11% who consider that it does not.

Serbs and Greeks, with 80%, are the most favourable to this opinion, followed by Poland, with 61% and Spain, with 56% (the country that is also the most critical on this issue, with another 44% believing only "some").

For permanent workers, the majority option would be "partly to enough" with 57%, with the option of not agreeing "at all or some" tripling as opposed to that shown by the independent workers, with 30% of the answers.



By country, those who think that this option is given enough or a lot are Serbia, 70%, Italy, 66% and Greece and Poland, with 54%. Spain and Slovakia, with more than 50%, are the most critical of this option.

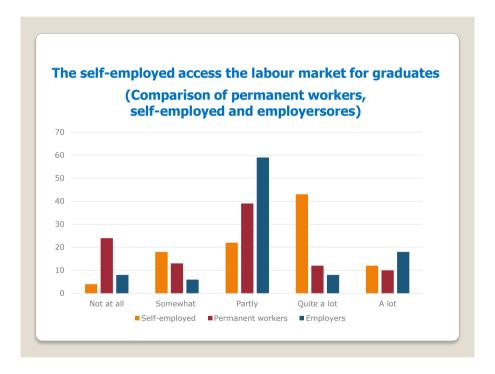
Employers are the least concrete in their opinions, with almost 50% responding that they agree "partly". The other options are divided into 35% "quite a lot or a lot" and 16% "not at all or somewhat" in agreement. Poland, with 86% of answers, is the most convinced that this work does provide adequate income, and Slovakia, with 48%, is the most opposed to this situation.

✓ Self-employment is the most suitable option for the entry of new graduates into the labour market.

As far as self-employed workers are concerned, the majority option agrees with the question posed: 55% of the answers given, as opposed to 22% who would show some disagreement and 22% who think they agree "somewhat".

By country, Portugal (67%), Greece and Serbia, with 50%, are the most accepting of this option. Those who share it the least are Portugal, which is at both ends, and Slovakia, with 33%.

As for permanent workers, 40% agree "partly"; 22% agree "quite a lot or a lot" and 38% agree "not at all or somewhat". Again, a clear difference is established with the position shown by the self-employed workers. The Serbs are those who bet on this option as the most appropriate in 60% of cases and Portugal, Slovakia and Italy, which share it least, with 40% of responses in that direction.



Finally, 59% of the employers agree "partly", while 25% agree "quite a lot or a lot" and only 14% do not accept this option as valid. Again, Polish employers, with 79% of answers, believe that self-employment is the most suitable option for the entry of new graduates into the labour market; while the most sceptical on this issue are Spain and Slovakia with 25% of negative answers.

CONCLUSIONS OF THE ANALYSIS OF THE SURVEY

In the following, and by way of conclusions of this *comparative report*, we will point out the most relevant data that can be perceived from the analysis of the project's *Research Surveys*.

- ✓ The **level of education** of those surveyed hardly offers any differences between the three groups participating in the survey. 90% of self-employed and permanent workers have university or secondary school qualifications, with slight differences between one and the other; the level corresponding to employers being a little lower, between both (84%) six points lower than in the case of workers.
- ✓ Interestingly, there is greater **job rotation** (number of employers worked for) among permanent workers, reaching 44% for more than 4 employers (compared to 23% who would have worked for 4 employers and 33% who would have always worked for the same employer), than in the case of self-employed workers, where 61% are with a maximum of 4 employers.
- ✓ In terms of the **characteristics of self-employment**, the most valued option was autonomy to carry out the work (38% of those surveyed), followed by "payment on order", 35%, and a contractual relationship of less than twelve months with 27%.
- ✓ Most self-employed workers believe that the reason they choose this type of work is need (55%), compared to 45% who say it is a personal choice. In turn, employers (who have no opinion in 34% of cases) think that personal choice prevails over necessity (46% versus 20%).
- ✓ The conditions of employment of the self-employed worker, gives rise to several conclusions:

for 75% this type of work represents their basic income, positively affecting 80% of those surveyed;

on a personal level this type of work is beneficial or acceptable for 72% of the self-employed workers surveyed; and

professionally, it positively affects 73%.

✓ The equation permanent work – self-employment, is resolved in favor of the first: more than 50% of permanent workers would not like to be self-employed; 46% are afraid of a change in their contractual situation; and 53% of both self-employed and permanent workers believe that the probability of self-employment growing is high or very high. Forty-five percent of employers say they believe in this same probability of growing self-employment.

✓ With regard to the **level of satisfaction**, we observe that self-employed workers feel a greater level of satisfaction, in their professional activity and in their working conditions, than permanent workers; fundamentally in such aspects as: the number of working hours and the capacity to choose those hours they work (with differences of up to 30 points); independence in their working life (with differences of 10 points with respect to permanent workers); the social benefits they receive (20 points difference) and the income and security of these (with differences with permanent workers of between 30 and 40 percentage points).

Permanent workers only show a higher level of satisfaction when referring to their general working life; the development of their professional activities; learning options and income security; however in all cases, with values between 35% and 40% compared to other options.

The view that employers have regarding the satisfaction of their permanent workers does not agree at all, with what they have expressed (with percentages in the assessments of between 55 and 60% as opposed to the already expressed 35/40% of workers' assessments).

✓ When the different groups are asked about what self-employment can bring (low costs, better quality products, business profits, increasing the workforce or creating unfair competition) the highest rankings on each of the questions proposed in the survey are given by the employers and, in a similar situation, by the self-employed.

Discrepancies between employers and self-employed workers arise when talking about the consideration of increasing the workforce (48% for self-employed workers and 30% for employers); and whether anxiety it creates about workers and employment conditions (45% for self-employed workers and 35% for employers).

On the other hand, the opinions of permanent workers are in acceptable percentages, between 30 and 35% in all the proposed items (except the opinions on the generation of lower costs for consumers and on the business benefits of adaptability).

✓ On the **need to regulate the gig economy**, 75% of self-employed workers are in favour, compared to 55% of employers and dependent workers.

On the other hand, this trend is reversed when analysing the answers on whether self-employed workers should participate in the activity of trade unions: while 79% of permanent workers think that they should; this percentage drops to 55% in the answers given by employers and self-employed workers (those affected by the question).

The last question submitted in the *Research Survey* concerned what the **gig economy means for new graduates.** Thus, we obtained that for 23% of permanent workers, 27% of self-employed and 33% of employers, this work system is considered valid for providing work experience.

That for 60% of self-employed workers it is a system for **obtaining adequate income** upon graduation (a figure that drops to 40% from the point of view of permanent workers and up to 35% from the point of view of employers). For 56% of these same self-employed workers, the gig economy is a good system for access to the labour market (compared to 25% of employers and dependent workers).



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