

De gestage groei van niet-traditionele arbeid

Recente studies over de trends en dynamieken in de wereld van flexibele werkvormen



next economy

Marleen Deleu
Hugo-Jan Ruts

SEPTEMBER 2019

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Beste lezer,

Met NextEconomy zijn we op een missie om kennis en inzichten te delen over de veranderende wereld van werk.

Werk en hoe het wordt uitgevoerd, zijn in de loop van de geschiedenis al vaker fundamenteel veranderd. De snelheid van de verandering die we nu meemaken echter is wél nieuw. Oorzaak zijn de vele technologische innovaties die elkaar in razend tempo opvolgen. Hierdoor ontstaan nieuwe banen en nood aan nieuwe competenties, maar verdwijnen ook banen, soms met tradities van tientallen jaren, door automatisatie. Ook de groei van de 'Gig economy' is mogelijk dankzij technologie.

De vraag of de samenstelling van de werkende populatie zal veranderen, is inmiddels achterhaald. Het antwoord is ja, en het is op dit moment aan het gebeuren! We zitten midden in de transformatie van hoe we werken, waar we werken en hoe we denken over werk.

Niet-traditionele arbeid groeit daardoor gestaag en zal dat blijven doen. Een belangrijke vraag die zich opdringt, is hoe snel organisaties en HR Managers hier op inspelen. Zij moeten de consequenties van deze veranderingen dringend ter harte nemen om hun organisatie te laten aansluiten op de toekomst van werk die al begonnen is. Een andere vraag stelt zich aan de politieke wereld, en luidt hoe we de sociale zekerheid zoals we die nu kennen, uit arbeid kunnen betalen als het hele concept arbeid in verandering is.

Niet-traditionele arbeid groeit en daarmee ook het belang ervan voor organisaties en de bijdrage aan onze economie en maatschappij. Onderbouwde studies over de vele 'nieuwe' vormen van werk zijn er inmiddels, maar ze zijn nog niet breed bekend. Met dit overzicht willen we daar aan verhelpen. We hebben een bondige samenvatting gemaakt van enkele van de meest recente studies en publicaties over niet-traditionele arbeid. Telkens is de bron vermeld zodat je zelf ook het desbetreffende rapport kan downloaden.

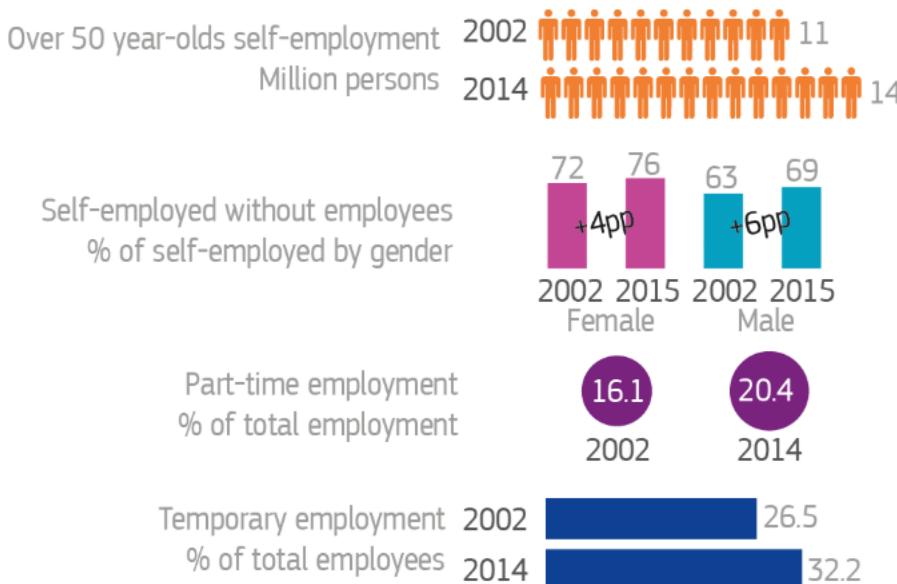
Veel leesplezier en inzicht gewenst in de boeiende wereld van niet-traditionele arbeid!

Marleen Deleu & Hugo-Jan Ruts

From Work as Employment to the Open Talent Economy

The European Commission's 2016 research on the future of work concludes by stating that work is no longer a static concept but an umbrella term for roles performed in a different manner and under different legal arrangements.

Employment Trends in the European Union: A Snapshot



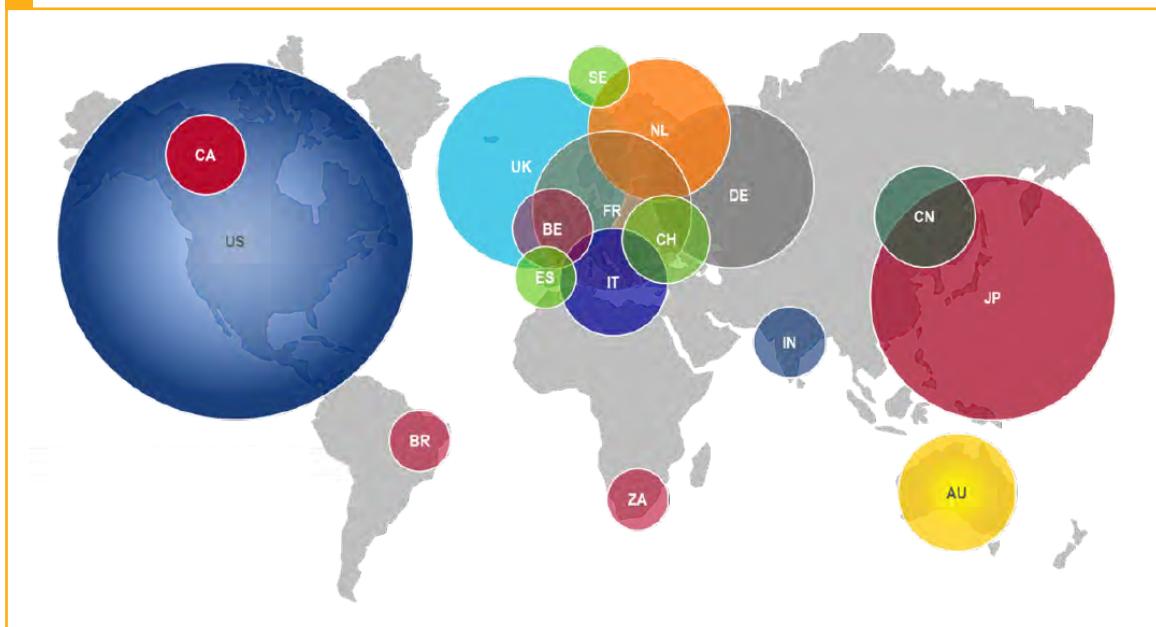
Source: Eurostat

'On demand' work is on the rise as is a 'project-focused' approach to work. What has been referred to as the 'Hollywood model' is a discernible trend across numerous sectors. Once a specific project, product or assignment is identified, a team of different people from different professions with distinct but complementary skills, comes together and collaborates in order to accomplish the task. Once the project is completed, the team disassembles and reconfigures with other members on another project (just like in Hollywood, teams and artists move on to the production of another film).

Bron: https://ec.europa.eu/epsc/publications/strategic-notes/future-work_en

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Global Staffing Market at €413 Billion (2017)



Source: Global Staffing Industry Market Estimates and Forecast, November 2018 Update

Contingent Work in Europe by Country (2017)

	Contingent				Total Contingent	Non-Contingent Employees	Contingent as % of Employees
	Temp Agency Work	Other Temp	Professional Independent Contractor	Other Independent Contractor			
Germany	1,032,238	3,751,262	1,466,800	758,400	7,008,700	36,706,300	19%
Italy	372,838	2,349,262	1,815,400	1,774,000	6,311,500	20,228,100	31%
Spain	136,303	4,054,497	733,200	1,319,400	6,243,400	14,624,700	43%
France	737,088	3,272,612	790,100	1,105,700	5,905,500	22,840,700	26%
Poland	216,000	3,202,000	556,600	1,687,000	5,661,600	12,972,700	44%
United Kingdom	917,052	622,448	1,866,300	2,104,200	5,510,000	30,291,100	18%
Netherlands	282,000	1,260,900	571,900	461,500	2,576,300	7,036,500	37%
Scandinavia	148,454	1,498,447	372,700	395,800	2,415,401	11,307,899	21%
Belgium	115,973	298,527	254,000	179,700	848,200	4,214,500	20%
Switzerland	90,408	433,092	185,100	127,300	835,900	4,079,600	20%
Austria	76,593	265,907	128,800	135,000	606,300	3,902,400	16%
					43,922,801	168,204,499	26%

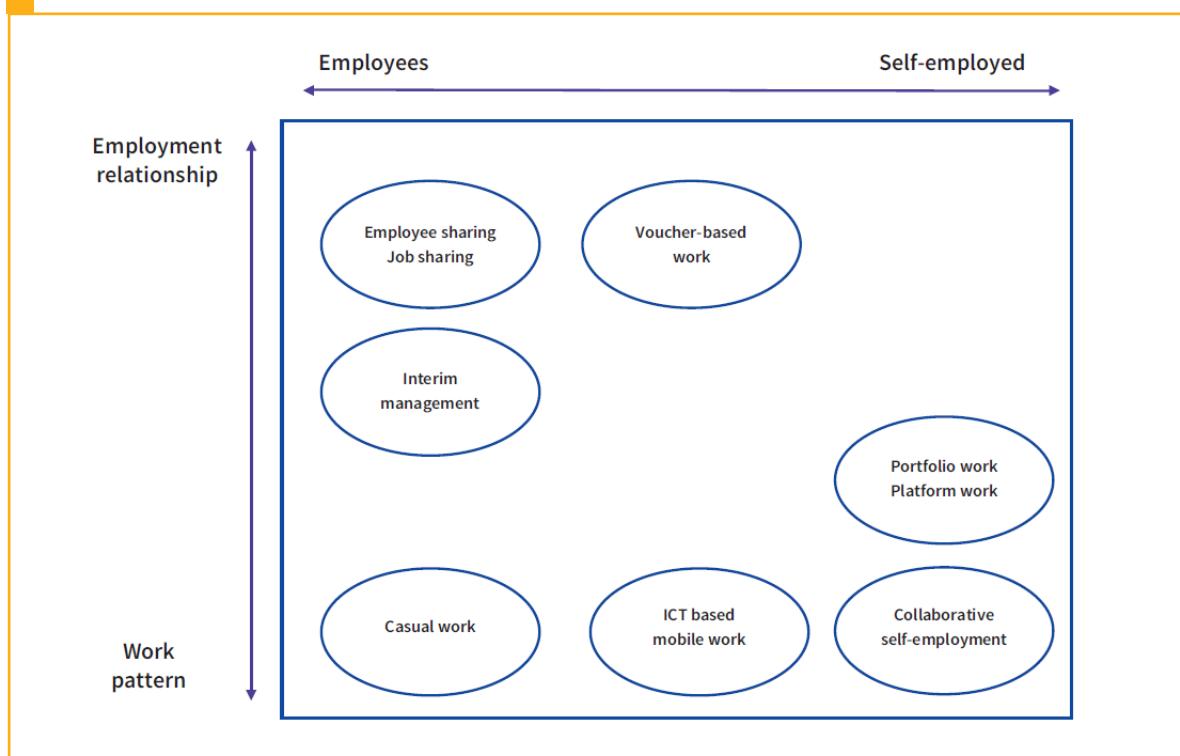
Source: Staffing Industry Analysts & Eurostat

A patchwork of parallel employment realities

Eurofound focused on forms of employment that have either emerged since around 2000, or that existed previously but have since become more prevalent.

Their 2018 project identified nine broad new forms of employment.

New forms of employment identified



Source: Eurofound

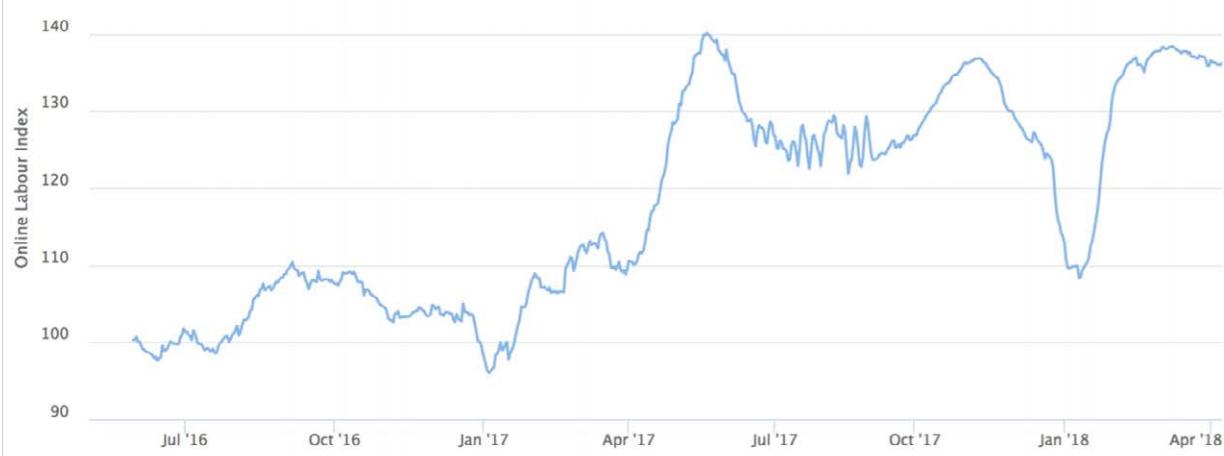
These may be new models of employment relationship between employer/employee, or client/worker; alternatively, they may be new patterns of work (how the work is conducted).

Bron: www.eurofound.europa.eu

The online gig economy grew at an annualized rate of 14 percent

The *Online Labour Index (OLI)* is an economic indicator that provides the online gig economy equivalent of conventional labour market statistics. It measures the utilization of online labour across countries and occupations by tracking the number of projects and tasks posted on platforms in near-real time.

The online gig economy grew 38% in 2 years



Source: Online Labour Index

The OLI shows that the online gig economy grew at an annualized rate of 14 percent.

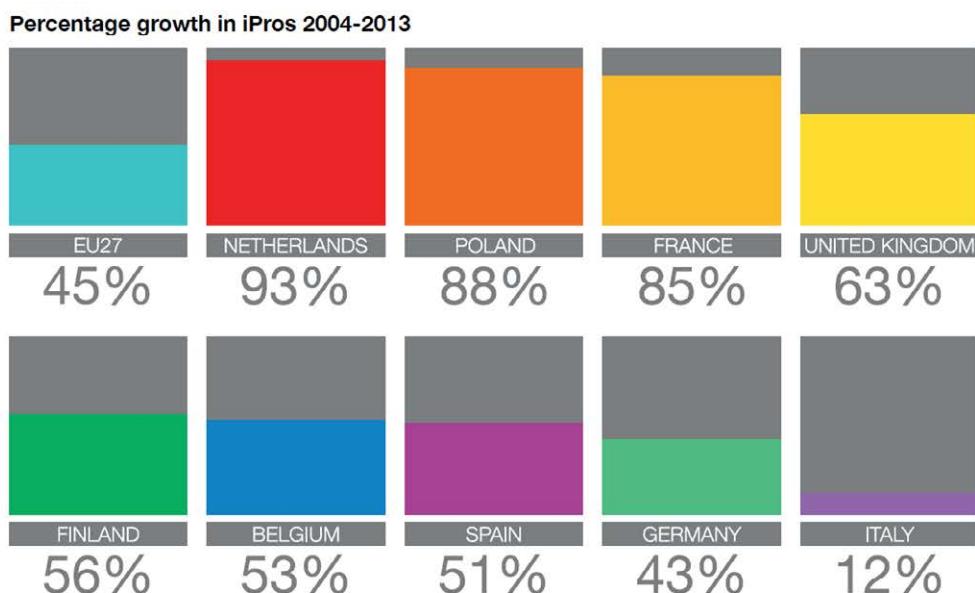
To benefit policymakers, labour market researchers, and the general public, the index is available as an open data set and interactive online visualization, which are automatically updated daily.

Bron: <https://ilabour.ox.ac.uk/online-labour-index/>

There is a major change in the way work is performed - a shift from having a job to working for clients

The EU has seen a new phenomenon - the rise of the independent professional, or iPro, often referred to as freelancers. Their rise represents a major shift in the nature of work and ways of working. No longer can work be defined simply in terms of working for a big corporation, public sector employer or an SME.

45% growth in professional freelance workers in the EU (2004 - 2013)



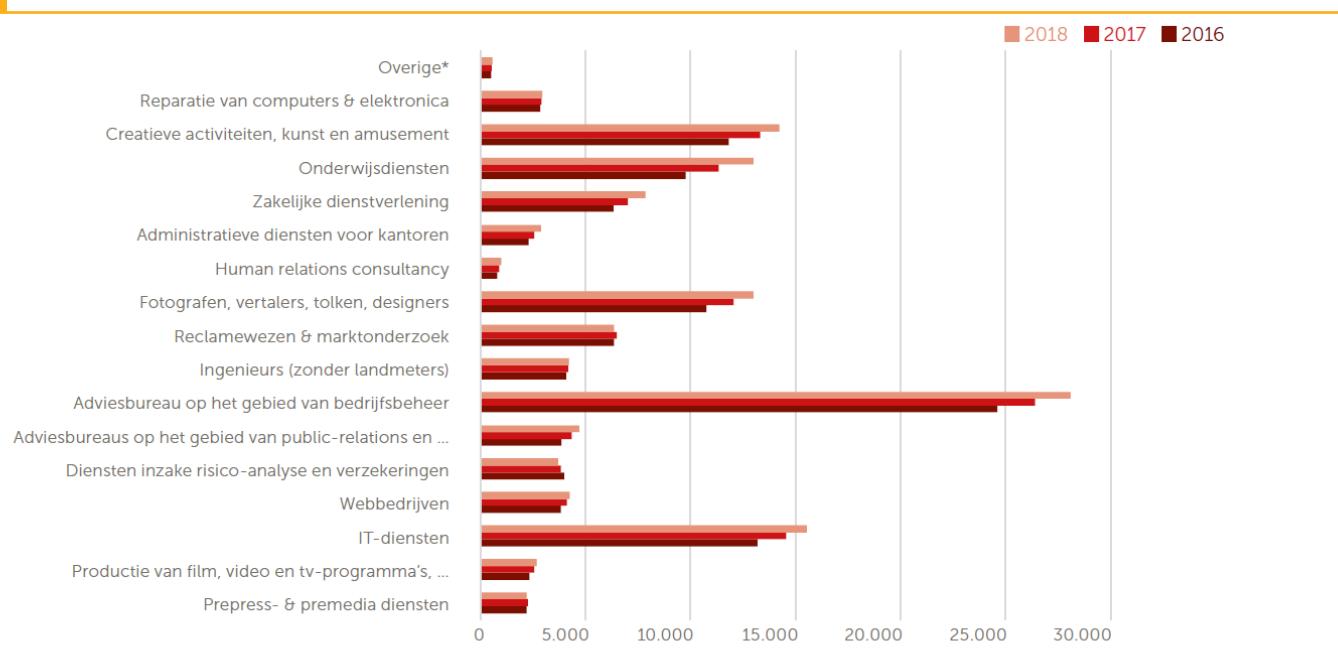
The growth in iPros in the EU since 2004 has been remarkable. Numbers have increased by 45% from just under 6.2 million to 8.9 million in 2013, making them the fastest growing group in the EU labour market.

Bron: www.pcg.org.uk

Het aantal freelancers in Vlaanderen en Brussel stijgt in quasi elke sector

UNIZO definieert een freelancer als “een ondernemer zonder personeel die hoofdzakelijk, maar niet uitsluitend in een business-to-business (B2B) context zakelijke diensten verleent en dit op basis van tijdelijke contracten, opdrachten of projecten.”

Aantal freelancers in Vlaanderen volgens NACE-code, 2016-2018



Source: Graydon Belgium nv/Unizo

In augustus 2018 waren er 157.697 freelancers actief in Vlaanderen en Brussel. Dat is 6,6% meer dan in augustus 2017. Voor Vlaanderen gaat het om een stijging van 22,7% op drie jaar tijd: van 103.767 freelancers in 2015 naar 127.277 in 2018.

Freelancers vinden we in alle takken van de economie. Ze kunnen actief zijn als consultant, grafisch vormgever, vertaler, copywriter, fotograaf, informaticus, gezondheidscoach et cetera. Ze kunnen lokaal gevestigd zijn en tegelijk klanten hebben over de hele wereld.

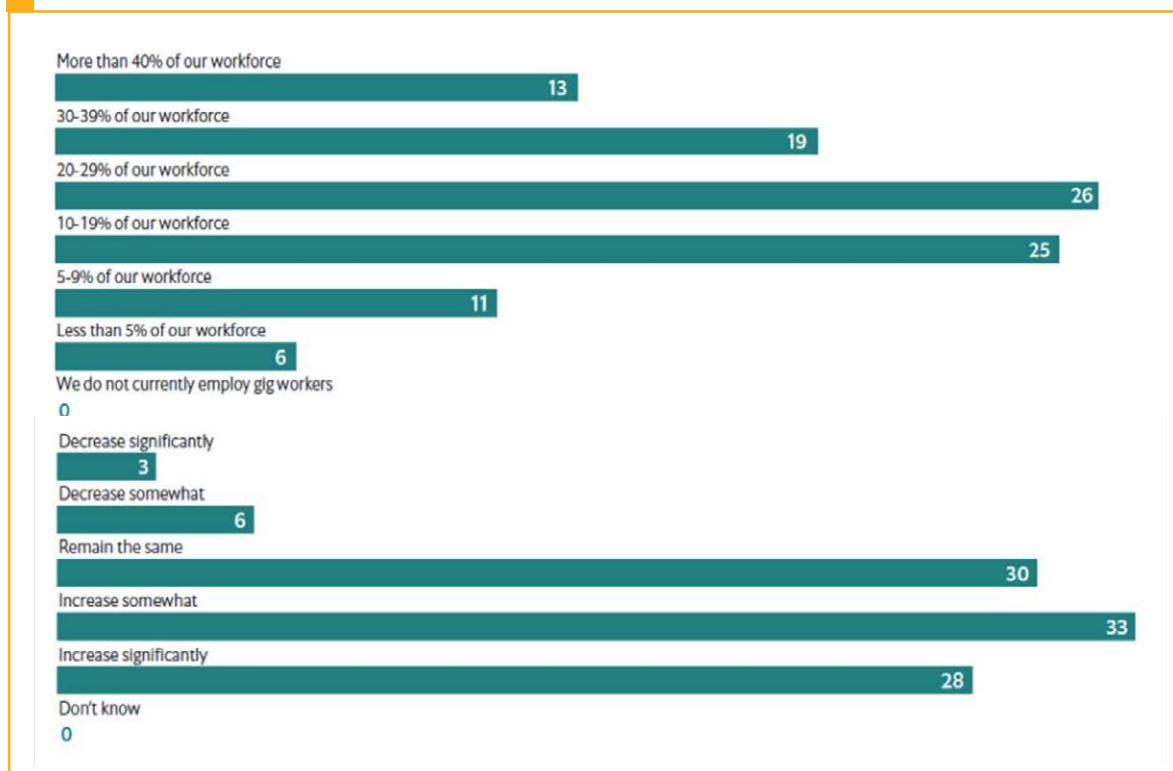
Op de vraag “Wat is uw hoogst behaalde schooldiploma?” antwoordt bijna de helft (48%) een master of doctoraat. 37% beschikt over een bachelorsdiploma en 15% genoot enkel secundair onderwijs.

Bron: <https://www.unizo.be/freelancer-focus>

Sourcing & managing talent in a gig economy

According to *The Economist Intelligence Unit's* February 2019 report almost 60% of the responding companies with + 2000 workers in the US (75%) en UK (25%) indicated that their contingent workforce represented at least 20% of their total workforce.

% of respondents...



A full 61% of respondents said they expected the proportion of contingent workers in the organization would increase somewhat (33%) or increase significantly (28%) in the next five years.

The study notes that "as companies master the art of on-boarding and integrating gig workers, they are discovering that the greater flexibility and lower costs more than offset the increased risk and burden on management."

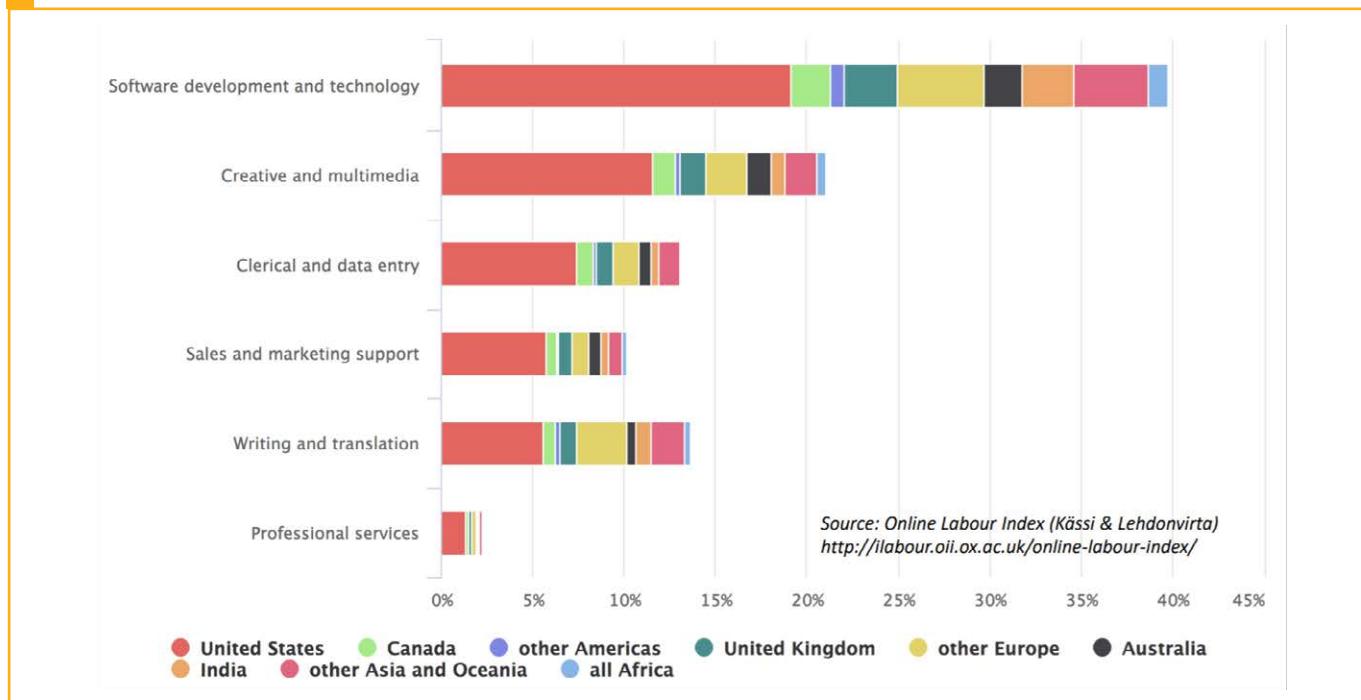
The use of contingent workforce is not new, the study continues, but it is changing: "What is changing is the fact that a sizable, semi-permanent (contingent) workforce is becoming the norm"

Bron:<https://spendmatters.com/2019/03/25/enterprises-use-of-contingent-workforce-grows-and-business-case-is-strong-the-economists-research-arm-finds/>

How Fortune 500 Firms Are Adopting Online Freelancing Platforms

A wide range of platforms now enable firms to source work directly from freelancers on an on-demand basis, but little is known about how and why firms are making use of such platforms.

Geographic use of platforms for sourcing freelancers



Source: Online Labour Index

The Oxford Internet Institute (OII) at the University of Oxford conducted nine case studies to examine how Fortune 500 firms and multinational enterprises are adopting platform sourcing as part of their business models.

They identified four distinct motivations for adopting platform sourcing among the enterprises:

- it provides easy access to a scalable source of labour skills and expertise;
- it reduces start-up and transaction costs
- it eliminates conventional hiring barriers
- Compared to conventional staffing agencies, enterprises furthermore experience the speed of contracting a freelancer and delivery of work outcomes as well as their quality as other important dimensions of value

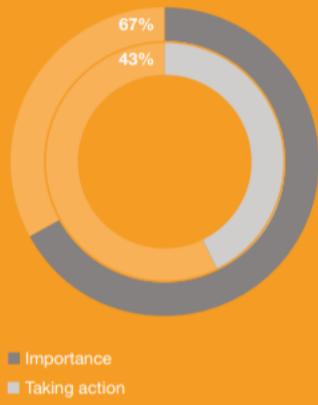
Bron: <https://www.oi.ox.ac.uk/publications/platform-sourcing>
<https://sorsafoundation.fi/wp-content/uploads/2018/03/Esitys-Vili-Lehdonvirta.pdf>

Preparing for tomorrow's workforce, today

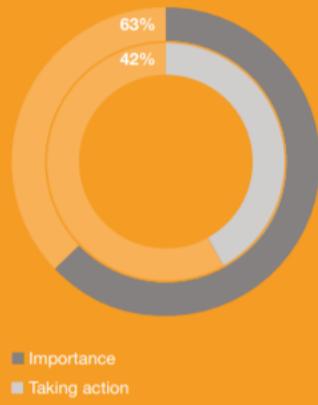
How we work, the place of work within our lives and even what we mean by work are being transformed. What are organisations doing to prepare? And where do they need to step up?

Falling behind on engaging flexible talent and new ideas

We are able to engage easily with flexible talent as and when they are needed



We use open innovation and crowdsourcing to generate ideas from people and institutions outside of our organisation



Respondents that say new ways of accessing talent are important compared with those who say they are taking action now

How important are the following to the future of your organisation? (Extremely HI or HI)
To what extent do you agree with these statements right now? (Strongly Agree or Agree)

PwC collaborated with Lynda Gratton, Professor of Management Practice at London Business School, and identified the most important organisational capabilities that businesses need to consider when preparing for tomorrow's work, workers and workplace. They surveyed over 1,200 organisations in 79 countries to find out how they are getting ready for the future and the key areas of risk they face.

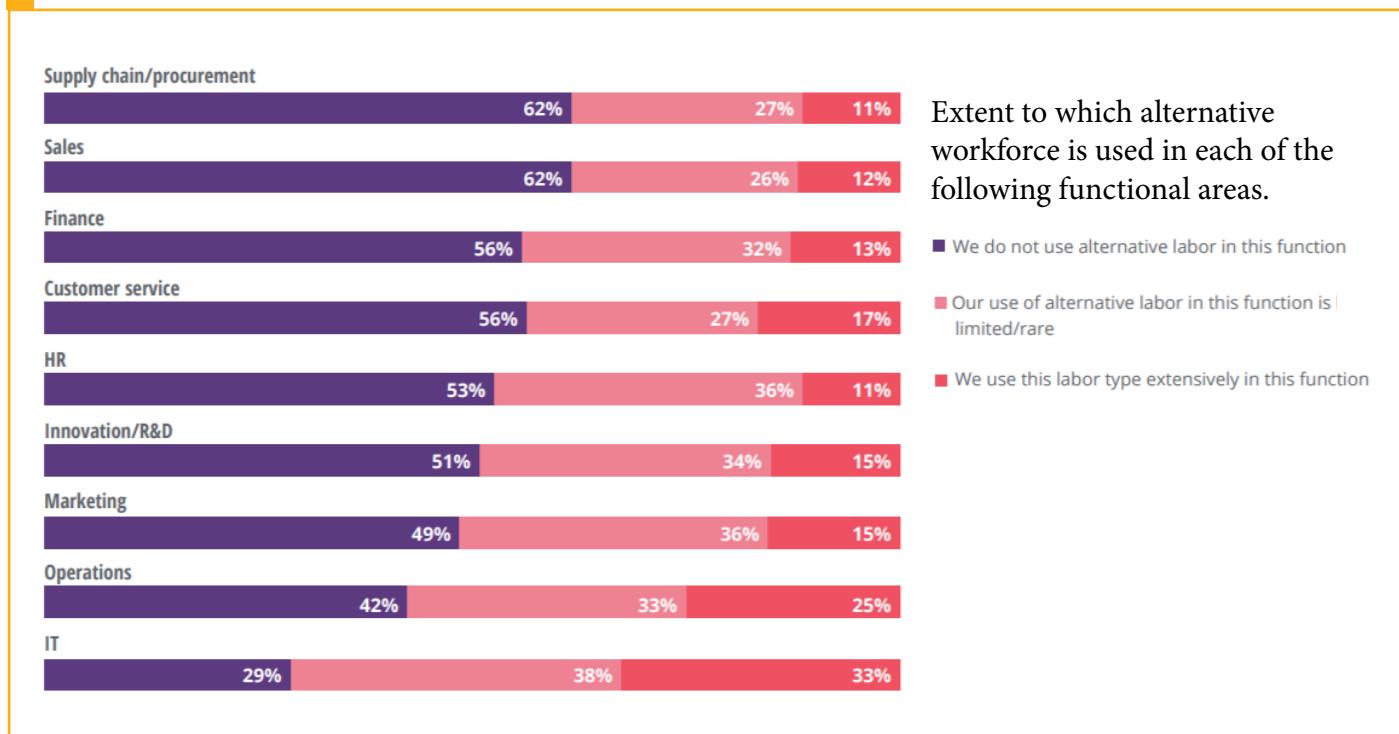
Identifying where and how to engage flexible talent will become increasingly important for organisations, yet few are prepared for this shift. Sixty-seven percent of organisations have the desire to make use of people who work off-site or at times to suit them but they're struggling to do so. Only 8% of respondents strongly agree that their organisations can engage easily with this valuable resource when needed.

Bron: <https://www.pwc.com/gx/en/people-organisation/pdf/pwc-preparing-for-tomorrows-workforce-today.pdf>

Most organizations are using alternative workers transactionally, not strategically

Deloitte's human capital trends for 2019 are organized into three actionable categories. The first deals with the future of the workforce: how organizations should adapt to the forces restructuring job and work design, the open talent economy, and leadership.

The use of alternative labor is spreading beyond the IT function



Source: Deloitte Global Human Capital Trends survey, 2019

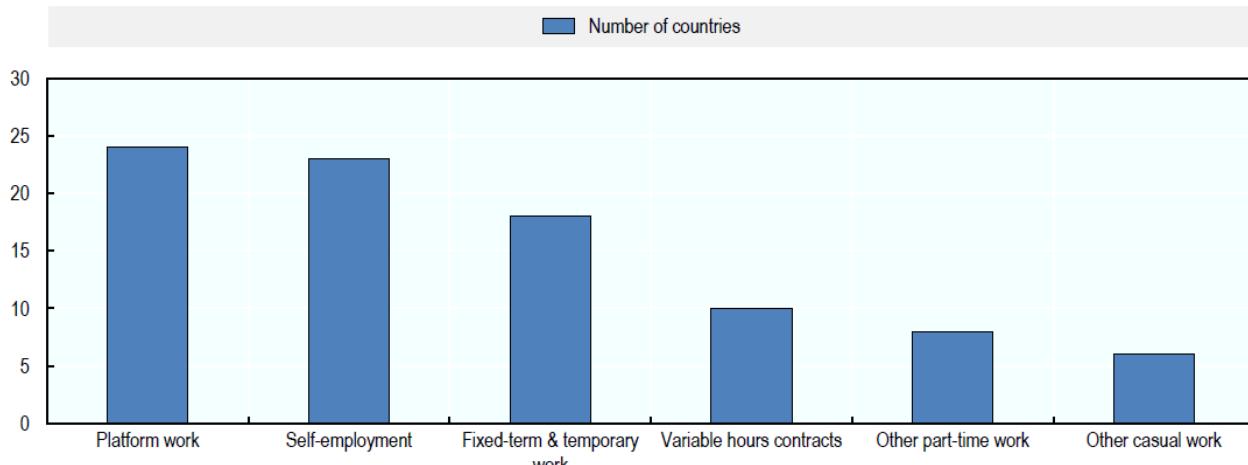
The alternative workforce is now mainstream. For years, many considered contract, freelance, and gig employment to be "alternative work," options supplementary to full-time jobs. Today, this segment of the workforce has grown and gone mainstream even as talent markets have tightened, leading organizations to look strategically at all types of work arrangements in their plans for growth. Best practices to access and deploy alternative workers are just now being invented. If the economy continues to grow, organizations must be more flexible in adapting to these new work arrangements, and plan to use them in a strategic way.

Bron:<https://www2.deloitte.com/content/dam/Deloitte/cz/Documents/human-capital/cz-hc-trends-reinvent-with-human-focus.pdf>

Policy Responses to New Forms of Work

The OECD Future of Work initiative looks at how demographic change, globalisation and technological progress are affecting job quantity and quality, as well as labour market inclusiveness – and what this means for labour market, skills and social policy.

Which ‘new forms of work’ receive the most policy attention?



The questionnaire allowed countries to discuss any forms of work currently capturing considerable policy attention in a national or subnational context. While some of these forms of work are not necessarily new, it is possible that they are being discussed with renewed focus in policy debates due to their prevalence among new business models, namely as platform or “sharing economy”¹ firms.

When asked what forms of employment tend to capture the most attention in the policy arena, most countries mentioned self-employment, generally in the context of challenges related to worker classification.

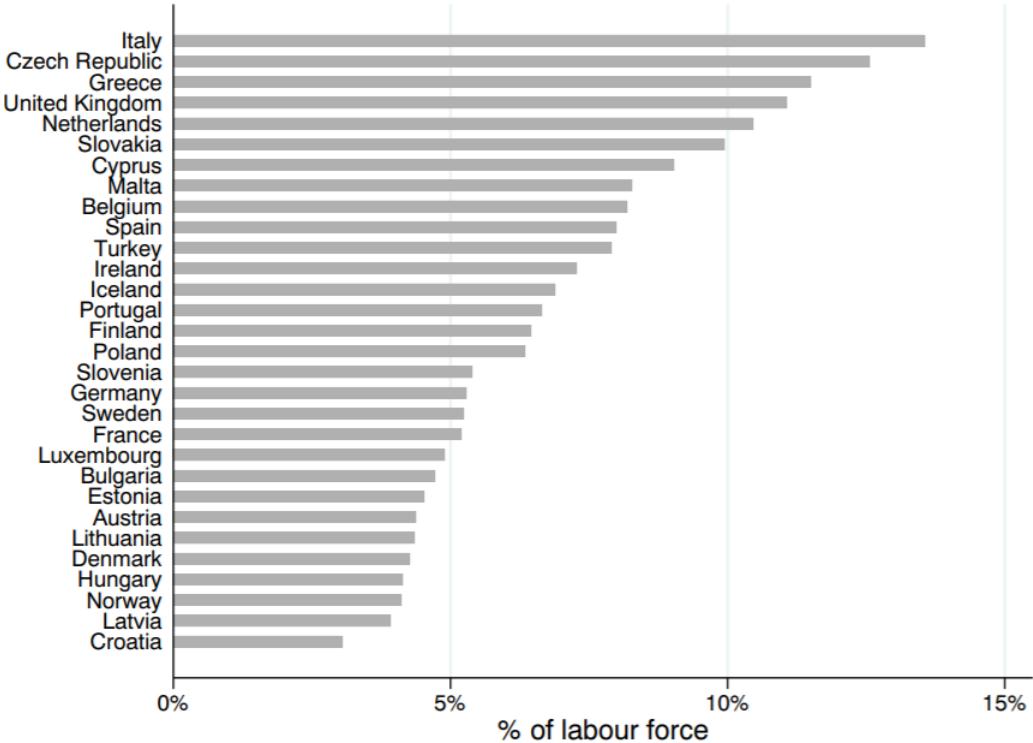
Platform work also captures policy and media attention in many countries. This describes transactions mediated by an app (i.e. a specific purpose software program, often designed for use on a mobile device) or a website, which matches customers and clients, by means of an algorithm, with workers who provide services in return for money.

Bron:OECD (2019), Policy Responses to New Forms of Work , OECD Publishing, Paris.
<https://doi.org/10.1787/0763f1b7-en>

The changing education distributions of solo self-employed workers

Using macro-level data for 32 European countries, this paper explores developments in the education distributions among solo self-employed workers and employer entrepreneurs in the non-agricultural economy over the period 1997–2014.

Non-agricultural solo self-employment rates (% of labor force)



Source: A. van Stel, P. van der Zwan

Our dynamic analysis reveals that over this period, the **number of solo self-employed workers, but particularly the high-educated solo self-employed, has increased considerably in Europe**. This trend is even more pronounced for female solo self-employment.

Bron: <https://link.springer.com/article/10.1007/s11187-019-00243-9>



Nextconomy

Over Nextconomy

Nextconomy streeft er naar de beide werelden van freelancers en hun opdrachtgevers meer met elkaar te verbinden. Freelancers en opdrachtgevers werken samen, maar weten erg weinig over elkaar. Wij willen de relatie tussen hen verbeteren, zodat ze elkaar veel beter leren kennen en begrijpen. Dat doen we door (eigen)zinnige meningen te delen zowel online als offline. Nextconomy gaat over trends, ontwikkelingen en opinies. Om te leren, om te begrijpen.

Met Nextconomy zwengelen we zo ook het debat aan over de toekomst van freelancewerken. Daarbij betrekken we de overheid, vakbonden, de academische wereld en andere belanghebbende partijen.

Nextconomy is een initiatief van Hugo-Jan Ruts en Marleen Deleu en is mede mogelijk door de steun van onze partners die onze visie en bezorgdheden delen.



www.nextconomy.be

September 2019