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Commission



Study to support the impact assessment
of a possible EU initiative to the application of
competition rules to
collective bargaining
by self-employed

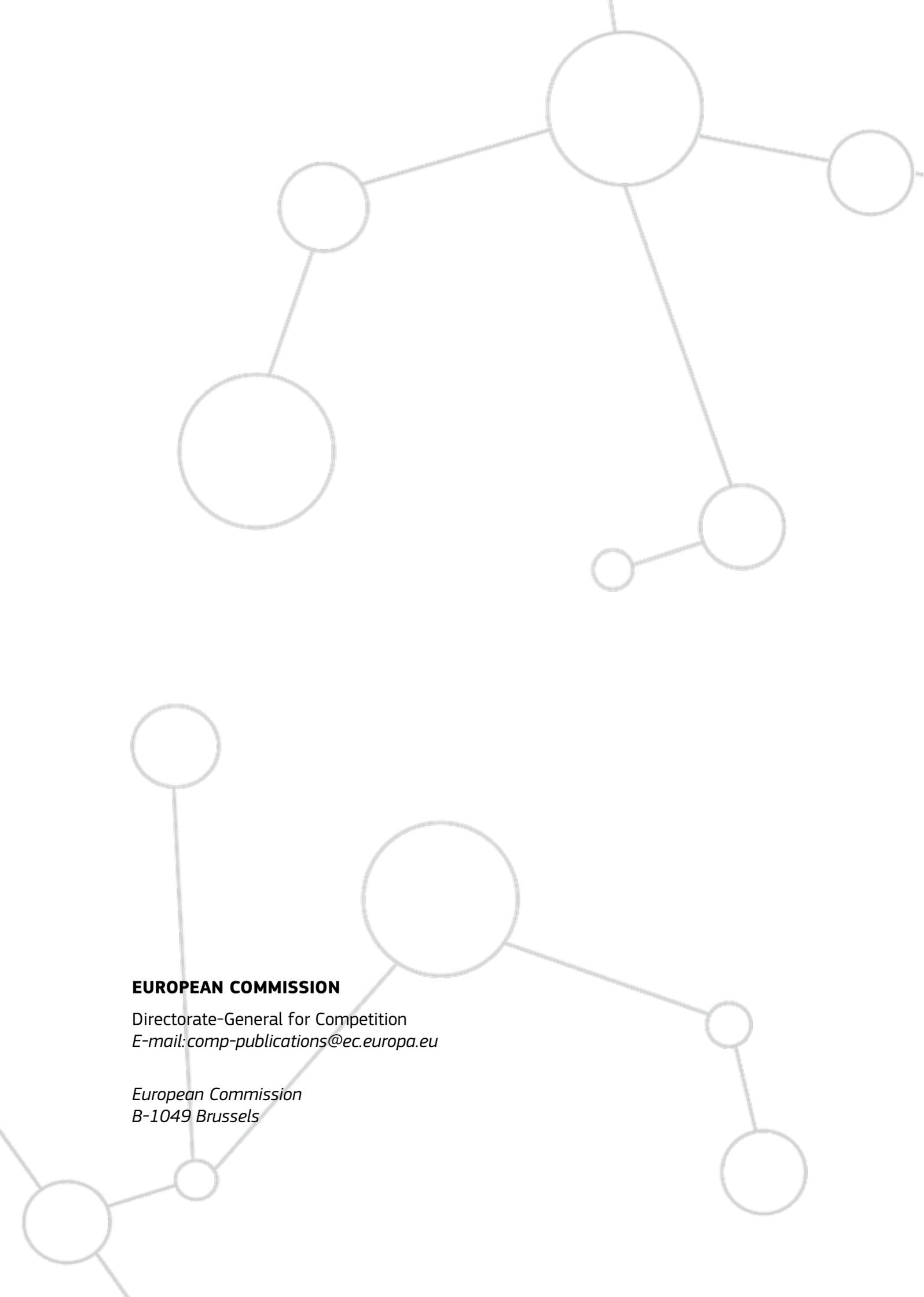
Prepared by



Annex 4

Findings of the survey of self-employed

Competition



EUROPEAN COMMISSION

Directorate-General for Competition
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*European Commission
B-1049 Brussels*

**Study to support the impact assessment of a
possible EU initiative to the application of
competition rules to
collective bargaining by self-employed
(COMP/2020/008)**

Annex 4 – Findings of the survey of self-employed

13 October 2021

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1. Quantitative survey findings: Headline Findings

Executive summary

This survey gathered the views and experiences of 3,819 self-employed from across eight European countries - Austria, France, Germany, Italy, Netherlands, Poland, Spain, and Sweden. Key findings for this group of self-employed are highlighted below.

Working conditions

- The majority of self-employed (81%) reported that they were self-employed with no employees and working for multiple clients.
- Around two-thirds (64%) of the self-employed had recently faced at least one of the below situations:
 - Been dismissed and rehired as self-employed/freelancer by a client
 - Majority of working week dedicated to single client
 - Limited number of clients on annual basis
 - Exclusively worked for intermediary organisation
 - Working hours determined by client
 - Working environment & tools provided by client
 - Had exclusivity clause meaning I can't work for another client
 - Had very little say on planning & execution of final contract
- Just over two thirds (65%) stated that being self-employed was their own choice, with 9% stating that no employed work was available, and 6% reporting that their client had asked them to be self-employed.
- Over a quarter (28%) of the self-employed surveyed found it difficult or very difficult to find work.

Satisfaction rates

- Levels of satisfaction with certain elements of working conditions are very low. Only a third (33%) are satisfied with the coverage of sickness and pensions, while just 42% are satisfied with leave arrangements. In terms of pay and income, just 47% are satisfied.
- Self-employed enjoy the freedom to organise their own work and the flexibility of their working hours, with 85% and 82% respectively stating that they were satisfied with these aspects of their work.

Negotiation power and coverage by collective agreement

- Around a third (34%) of respondents did not feel able or did not know whether they were able to change their working conditions. Of these who felt unable to change their working conditions, 50% said this was due to competition in their sector, while 19% said that it was due to not belonging to a trade union.

- Over a third (39%) of the self-employed agreed that collective actions - such as joining a trade union, strikes or collective bargaining agreements - are an effective way to improve their negotiation powers with clients.
- One third (33%) of the self-employed noted that they were either permanently or occasionally covered by a collective agreement on employment conditions.
- Overall, 39% of the self-employed were either very positive or positive about the idea of an initiative to exclude from the prohibition of cartels collective agreements that regulate the working conditions of self-employed people.
- However, there was a good deal of uncertainty around this initiative in each country, with around half of more of the self-employed unsure if such as initiative would be positive or negative.

Survey recruitment

Survey respondents were recruited via Dynata,¹ a data and market research company, using different panels that operate in Austria, France, Germany, Italy, Netherlands, Poland, Spain and Sweden. These included traditional online consumer panels² and existing loyalty panels covering the travel, entertainment, media, and retail sectors. Both of these types of panels offer members incentive points for completing surveys.

Any individual can apply to join these panels by completing a joining survey and going through a double opt-in email process to validate their personal details. In Austria, Netherlands, and Sweden, Dynata also used trusted local panel partners to boost sample sizes. Invitations including e-mails, phone alerts, banners and messaging on panel community sites were used to recruit respondents for this survey. In addition, organic, open enrollment, partnerships, and affiliate network (including schools) were used to recruit respondents via websites, social media influencers and mobile apps.

The recruitment process screened out individuals who did not class themselves as self-employed. To prevent duplication of respondents across sources, third-party digital fingerprint technology was used. To achieve a balanced sample, potential respondents were asked questions on age, gender, occupation, education level, and sector of work. Checks were also done to identify illogical or inconsistent responding, with such respondents removed from the final sample.

Survey sample

3,819 self-employed responded to the online survey, with just over 500 respondents from each of Austria, France, Germany, Italy, Netherlands, Poland, and Spain. The response from Sweden totalled just over 300 people. Results are presented for all self-employed by country. Data were also split into three additional groups, however, little variation is observed between groups, more variation is seen at country level. Where variations exist between these groups this is highlighted in the text. The three additional groups are:

- *Platform workers* (i.e. self-employers who find works through online platforms. See Figure 3 for more details)
- *Self-employed working for big firms* (i.e. with 100 or more employees; see Figure 2 for more details)
- *Self-employed in liberal professions* Throughout this note, individual country-level charts are included only where differences exist between countries.

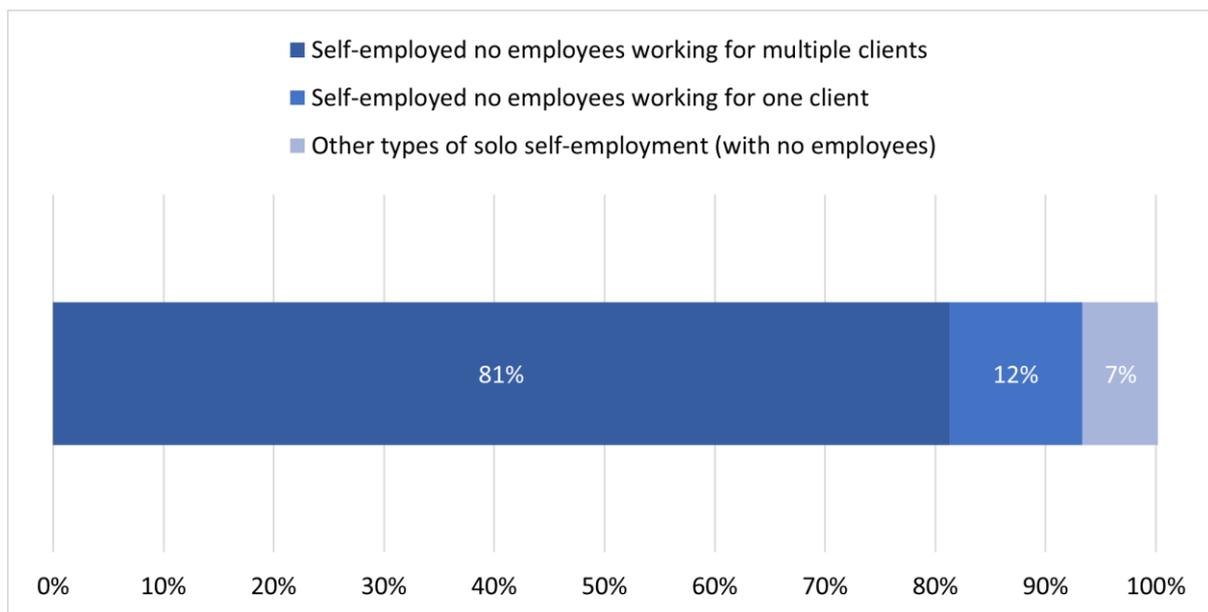
¹ <https://www.dynata.com/>

² For example, in the UK, the panel www.valuedopinions.co.uk is used.

Working Conditions and satisfaction rates

The majority of self-employed (81%) reported that they were 'self-employed with no employees and working for multiple clients'³ (Figure 1). This breakdown is similar across all countries apart from Sweden, where 73% selected this option and 17% were working for just one client.

Figure 1 Self-employment types ⁴



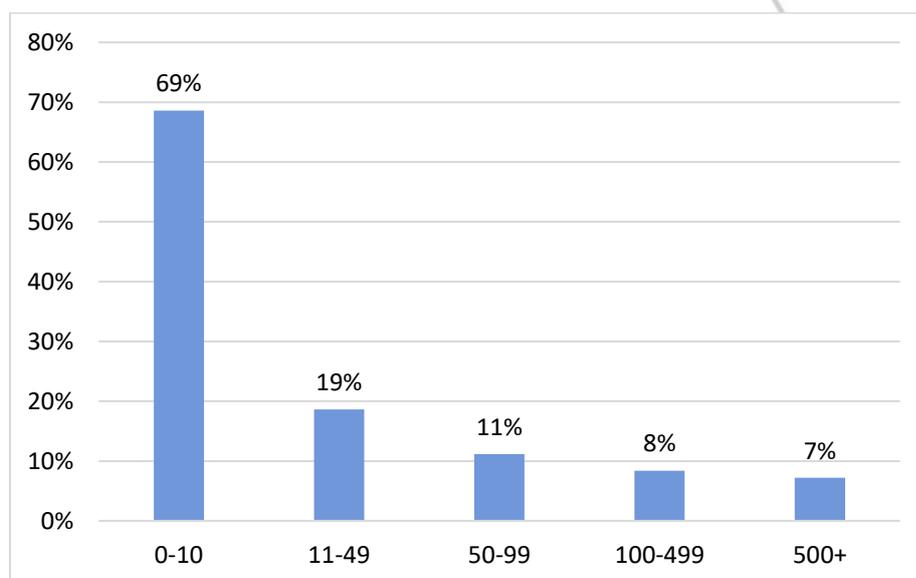
Source: Ecorys analysis

Figure 2 shows that over two thirds of the self-employed (69%) work with small clients (those with between 1-10 employees), with only 15% working for large clients (those that have 100 plus employees). These breakdowns are similar across countries, with France being the notable exception, with just 9% working for large clients and 80% working for clients with 1-10 employees.

³ Multiple clients refer to those working for more than one client.

⁴ Respondents were asked 'Which of the following best describes the work that you have been doing over the past 12 months? Self-employed, with no employees, and working for multiple clients; Self-employed, with no employees, and working for one client; Other types of solo self-employment, with no employees.'

Figure 2 Client size (number of employees)⁵



Source: Ecorys analysis. Respondents could select more than one option.

The self-employed covered by the survey work in a wide variety of sectors, with the most common occupations being white collar/office workers (19%), professional/technical/scientific (16%), and arts/literary/culinary (11%) (Table 1). The distribution of occupations is similar across all countries.

Table 1 Occupation of self-employed respondents⁶

Occupation	Count	Percent of total respondents
Arts / Literary / Culinary	417	11%
Construction / Tradesman / Skilled Labourer (Painter, Mechanic, Plumber, etc.)	390	10%
Education Administration / Support Services	139	4%
Educator (Professor, Teacher, Coach, etc.)	226	6%
Entertainment / Sports / Media	308	8%
Farming	123	3%
Healthcare Professional (Not GP / Doctor)	215	6%
Hourly Wage Worker (Waiter, Bar tender, Shelf stacker, Porter, etc.)	231	6%
Military / Civilian Uniform Services	17	0%
Not stated	57	1%
Physician / Doctor / General Practitioner (GP, specialists, etc.)	64	2%
Professional / Technical / Scientific	621	16%
Professional Driver / Delivery Driver	97	3%
Restaurant	5	0%
Retail	51	1%
Solicitor / Barrister	121	3%

⁵ Respondents were asked 'What is the approximate size of the client or clients you work for?' (Multiple response).

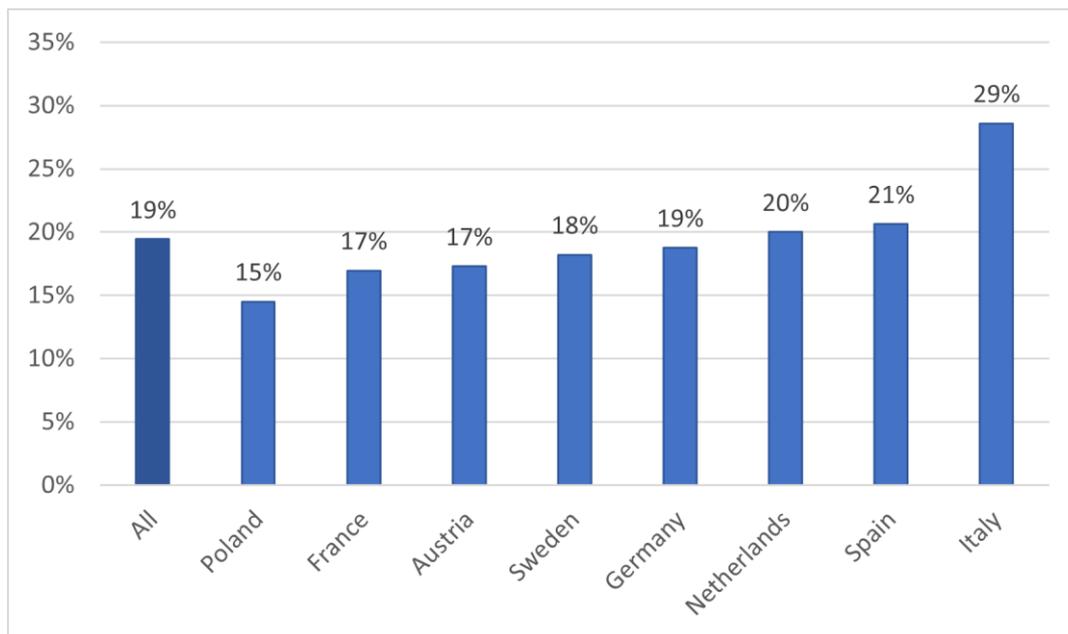
⁶ Respondents were asked 'Which occupation describes best the work you do most of the time?' (Single response)

Transport	8	0%
White Collar / Office Worker (includes executive management, middle management, and individual contributors)	729	19%
Grand Total	3819	100%

Source: Ecorys analysis

Figure 3 shows that on average, in the surveyed countries, 19% of self-employed work in liberal professions (i.e. as Solicitor / Barrister or in Professional / Technical / Scientific roles). The smallest share of self-employed in liberal professions is found in Poland (15%), while this share almost doubles in Italy (29%).

Figure 3 Share of self-employed working in liberal professions⁷



Source: Ecorys analysis

Self-employed find work in a variety of ways, with almost half (49%) using their own client list, over a quarter (29%) using online platforms and 24% advertising.⁸ Figure 4 shows that the share using online platforms is highest in Poland (40%) and lowest in Spain (20%). Of those using online platforms to find work, 96% reporting using platforms such as Uber, Deliveroo, Task Rabbit, Upwork, Mechanical Turk, YouTube, Twitch, and Jovoto.

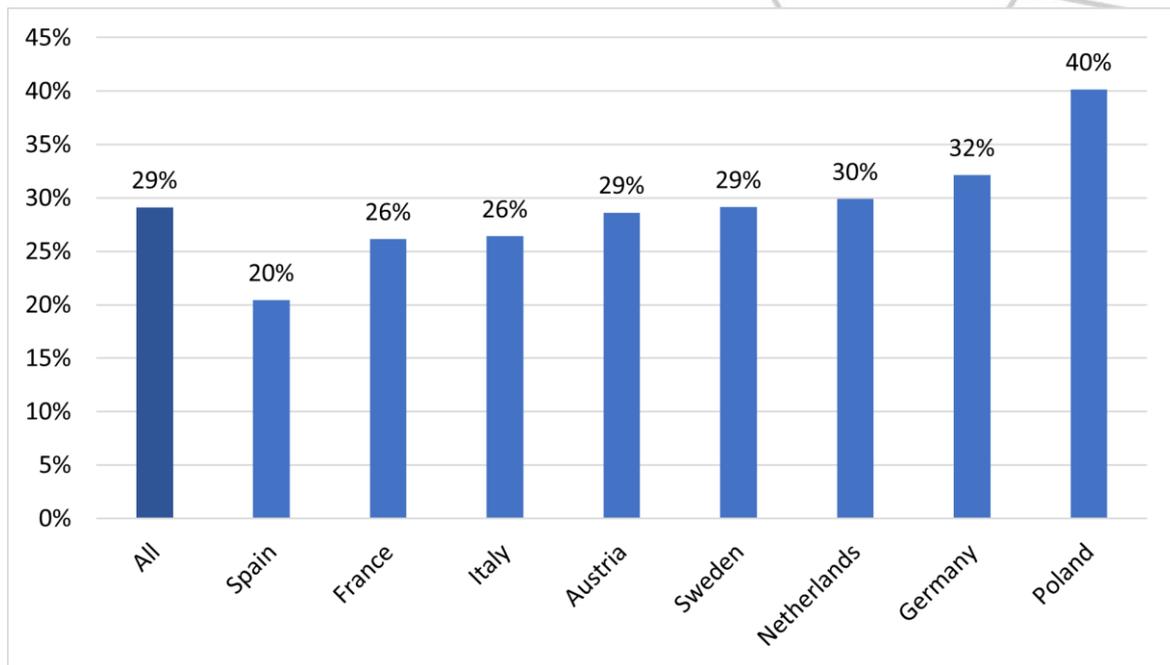
The self-employed in Poland are more likely than other countries to find work as a subcontractor,⁹ at 19% versus 10% or fewer in all other countries. Those in the Netherlands are the most likely to find work via their own client list (Figure 5) at 58% against an all-country level average of 49%. The self-employed in Spain are least likely to find work via agencies (4%), while in Germany this raises to 15% (Figure 6).

⁷ Respondents were asked 'Which occupation describes best the work you do most of the time?' (Single response)

⁸ Respondents were asked 'How do you find work as a self-employed worker?' Respondents could select more than one option so percentages do not sum to 100, but unfortunately it is not possible to infer which is the preferred option

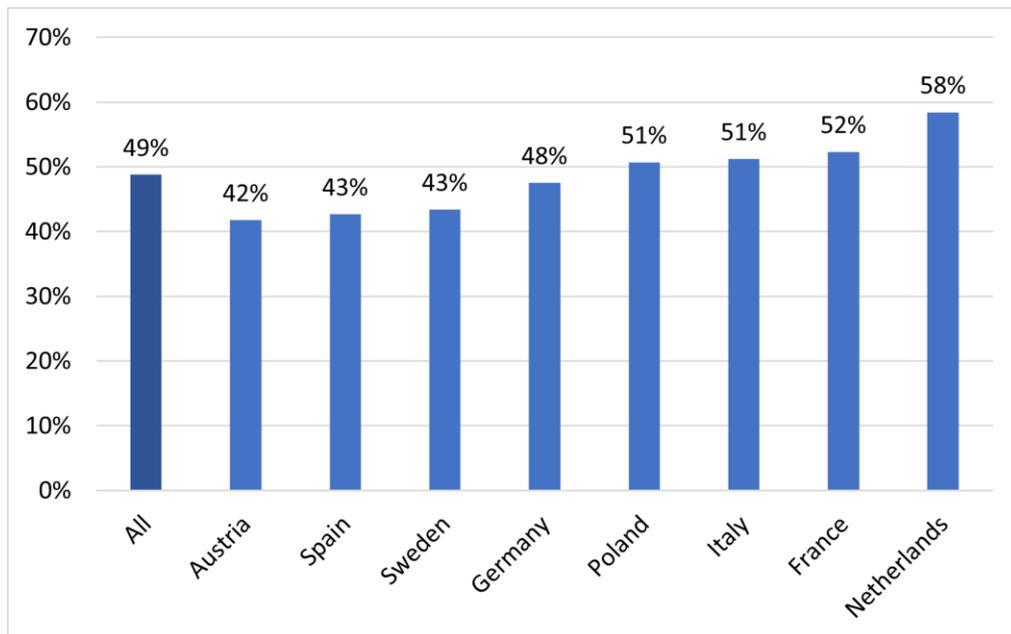
⁹ Subcontractors are self-employed individuals who work with an independent organisation on a specific project. The individual will still be classified as self-employed, as they are often bought in by the organisation to provide expert advice.

Figure 4: Share of self-employed finding work via online platforms



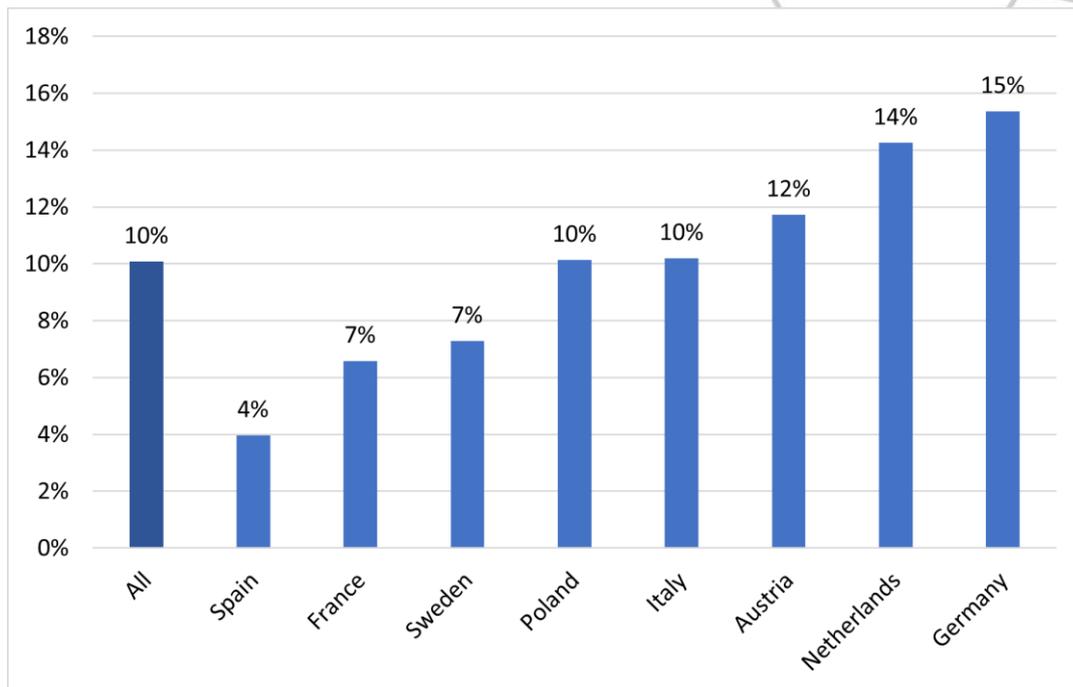
Source: Ecorys analysis

Figure 5: Self-employed finding work via their own client list



Source: Ecorys analysis

Figure 6: Self-employed finding work via temporary employment agencies¹⁰



Source: Ecorys analysis

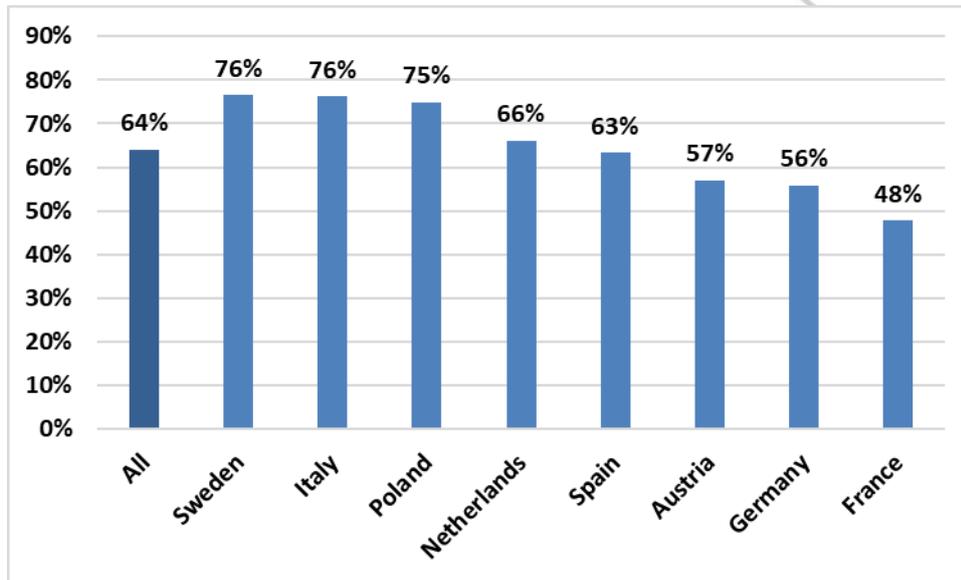
Overall, just under two thirds of self-employed have recently faced at least one of the below situations:

- Been dismissed and rehired as self-employed/freelancer by a client
- Majority of working week dedicated to single client
- Limited number of clients on annual basis
- Exclusively worked for intermediary organisation
- Working hours determined by client
- Working environment & tools provided by client
- Had exclusivity clause meaning I can't work for another client
- Had very little say on planning & execution of final contract

This average share varies a great deal by country, with just under half (48%) of the self-employed in France having recently experienced at least one of the situations listed above, while in Sweden, Italy and Poland, this percentage rises to around three quarters (Figure 7). As shown in Figure 8, the share who have recently found themselves working for a limited number of clients also varies by country, from 18% in France to 43% in Italy. The percentage stating that they have recently had their working hours determined by the client varies from 12% in Italy to just over a third (36%) in Sweden (figure 9). Outside of these differences, responses are similar across countries, with low numbers recently experiencing the other situations listed (Figure 10).

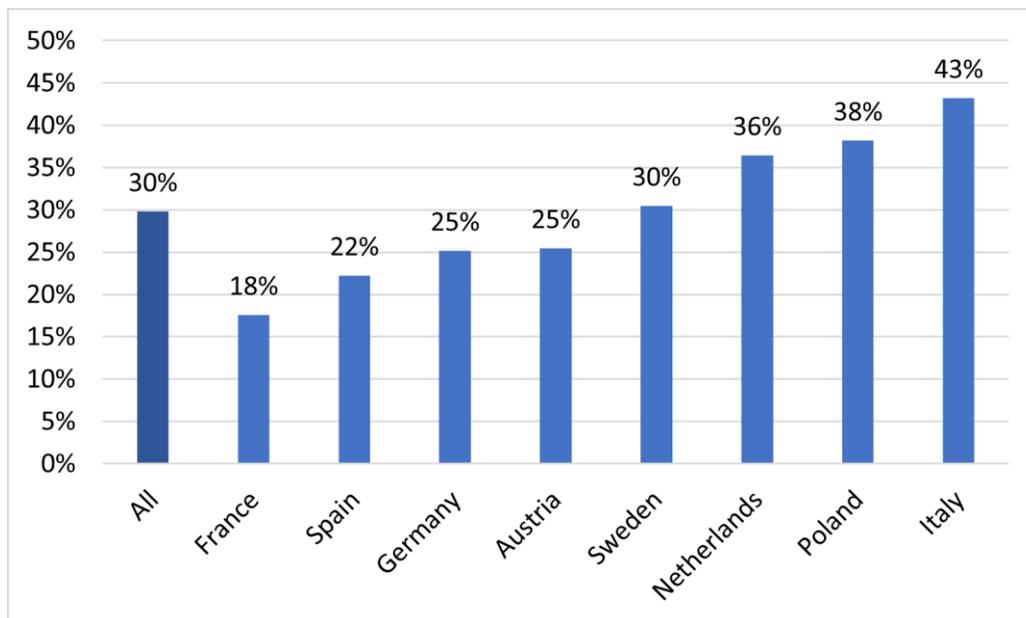
¹⁰ Under Directive 2008/104, Work Agencies can not place self-employed. As such, the fact that respondents are reporting that they find work via agencies may indicate that they are not always aware of their legal situation and rights.

Figure 7: Percentage of self-employed who have recently experienced any of the above situations¹¹



Source: Ecorys analysis

Figure 8: Percentage of self-employed recently working for a limited number of clients on annual basis¹²

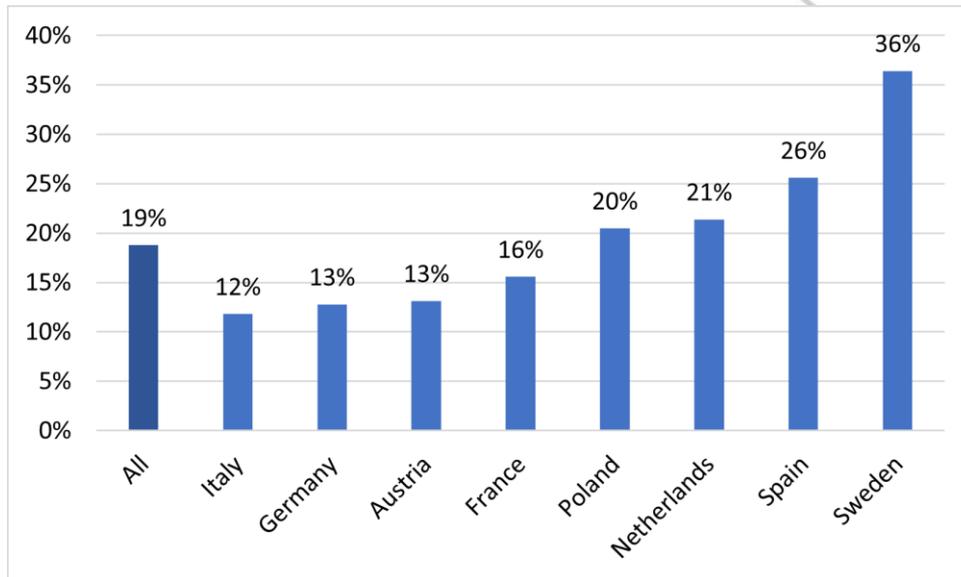


Source: Ecorys analysis

¹¹ Respondents were asked 'Could you tell me if you recently found yourself in any of the following situations as a self-employed person' (Multiple response, with one option being 'None of the above.')

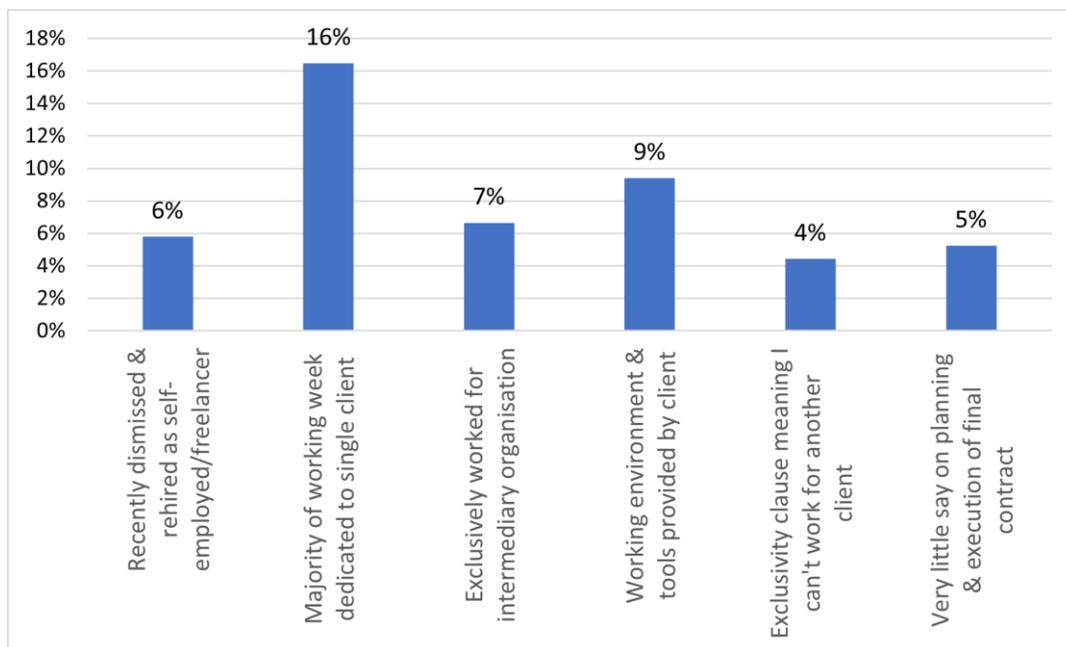
¹² The survey asks, 'Could you tell me if you recently found yourself in any of the following situations as a self-employed person'. One of the options respondents can select is 'I had a limited number of clients on an annual basis.' Limited is not specifically defined.

Figure 9: Percentage of self-employed who have recently had their working hours determined by the client



Source: Ecorys analysis

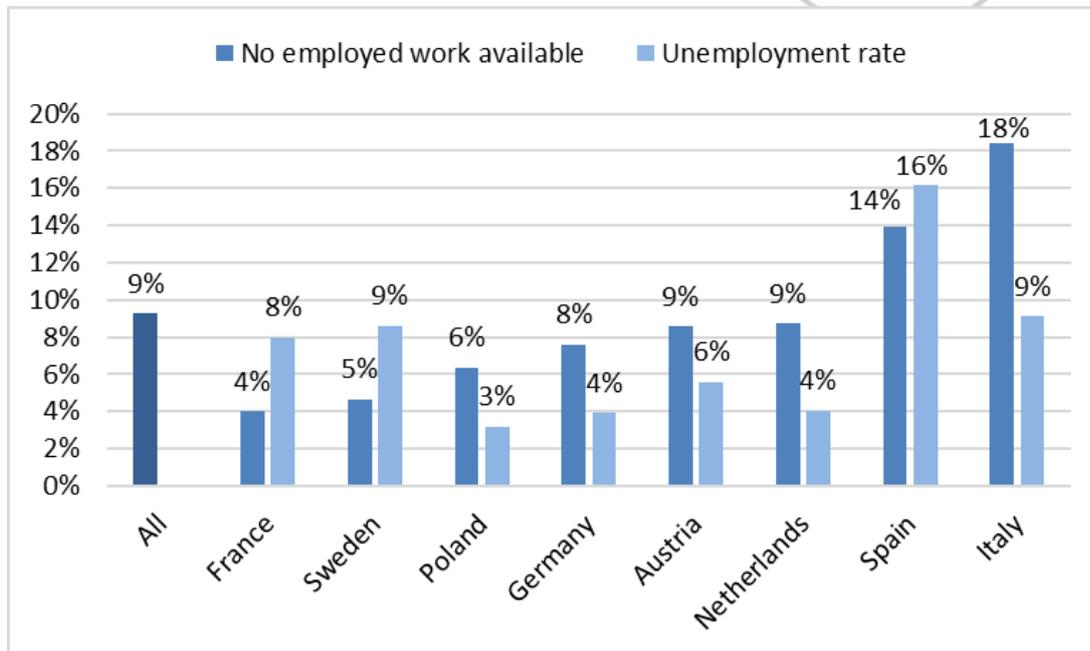
Figure 10: Percentage of self-employed who have recently experienced other situations



Source: Ecorys analysis

Just over two thirds (65%) of self-employed stated that being self-employed was their own choice, with 9% stating that no employed work was available and 6% reporting that their client had asked them to be self-employed. Other reasons given included that it was just the best way of working for their job (13%) and limiting factors such as illness or care responsibilities (5%). These breakdowns are similar across countries, with the greatest variation seen in the percentages stating that no employed work was available (Figure 11) and self-employment being their own choice (Figure 12).

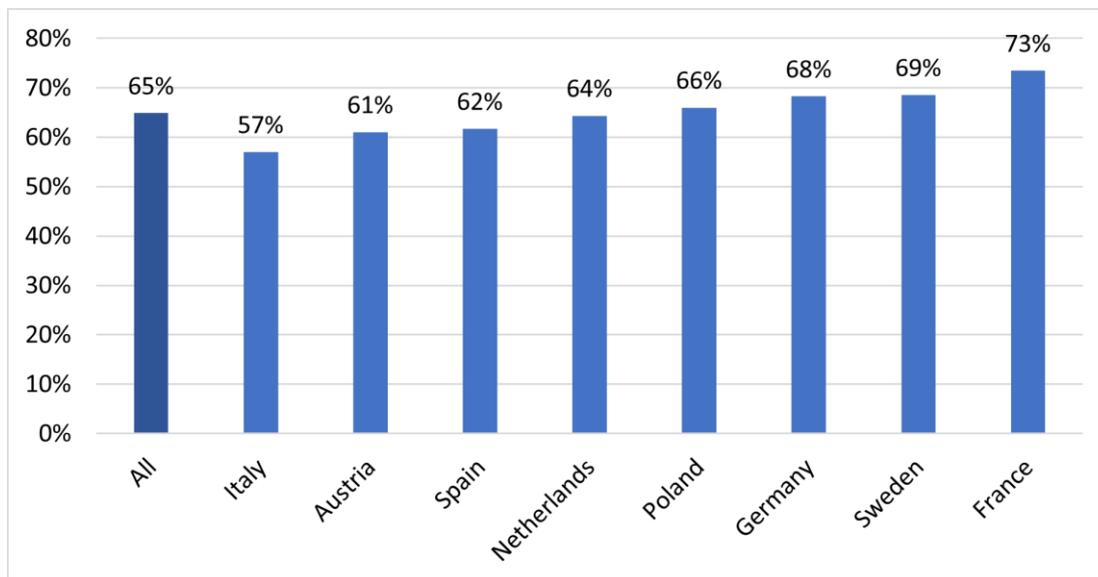
Figure 11: Percentage who are self-employed due to no employed work being available¹³



Ecorys analysis and Eurostat unemployment by sex and age, 2020 Q4.¹⁴

Source:

Figure 12: Percent who are self-employed through their own choice¹⁵



Source: Ecorys analysis

Over two thirds (67%) of the self-employed spend nine months or more a year working as a self-employed individual. Just under a third (32%) noted that they found it very easy or quite easy to find work as a self-employed person (Figure 13). This share was greatest in the Netherlands (45%) and

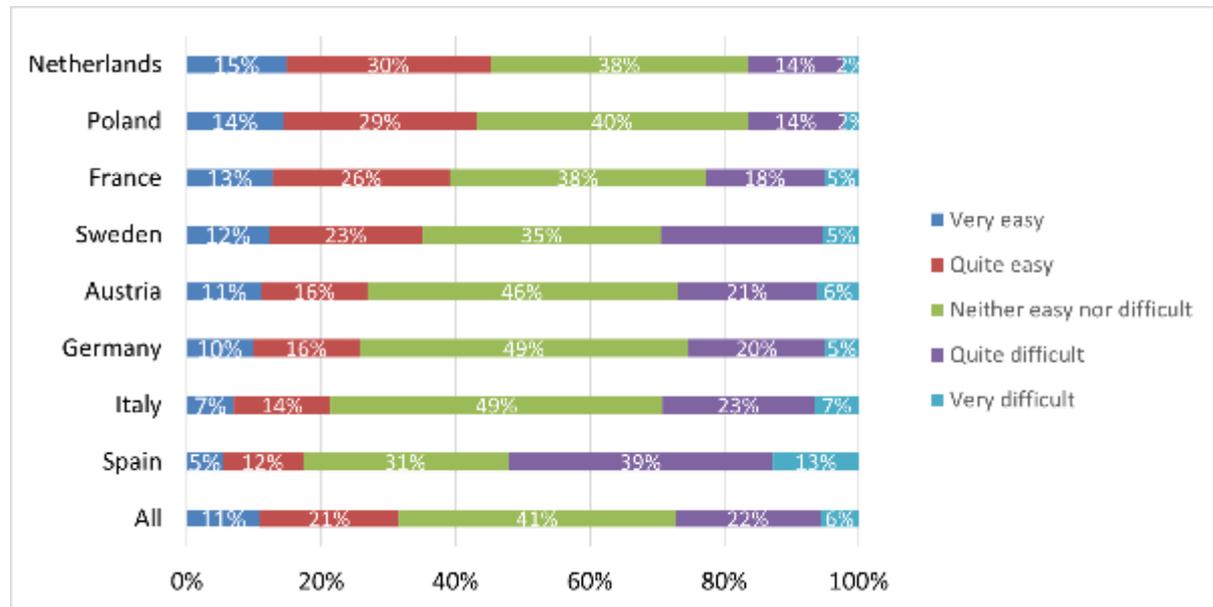
¹³ Respondents were asked 'What is your main reason for working on a self-employed basis?' (Single response).

¹⁴ <https://ec.europa.eu/eurostat/web/lfs/data/database>

¹⁵ Respondents were asked 'What is your main reason for working on a self-employed basis?' (Single response).

lowest in Spain (17%). Just over half (52%) of the self-employed in Spain said they found it very or quite difficult to find self-employed work, the highest percentage in any country.

Figure 13: How difficult do you find it to get work as self-employed?¹⁶



Source: Ecorys analysis

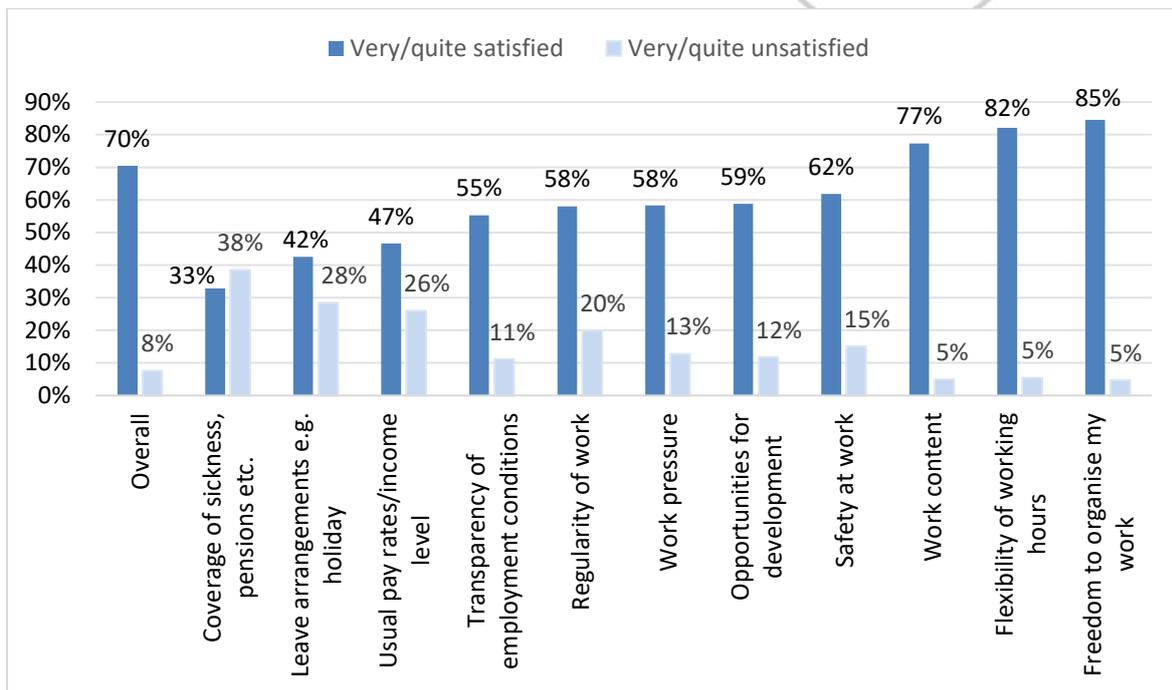
Despite the fact that 70% of the self-employed were either very satisfied or quite satisfied with their current working situation, levels of satisfaction with certain elements of working conditions are very low. Only a third (33%) are satisfied with the coverage of sickness and pensions, while just 42% are satisfied with leave arrangements. In terms of pay and income, just 47% are satisfied. In all countries, levels of satisfaction are lowest for coverage of sickness and pensions, and highest for flexibility of working hours and degree of freedom to organise own work.

Individuals working for just one client were the least satisfied with their working conditions, with 64% saying that they were either very satisfied or satisfied overall, compared to 71% of those working for more than one client. This difference is driven by fewer respondents who work for just one client being very or quite satisfied with the flexibility of their working hours (at 73%) and their freedom to organise their own work (at 75%), compared to 84% and 86% respectively for those working for more than one client. Levels of satisfaction with other elements of working condition are very similar across groups.

The self-employed who noted that they work for large clients (those with 100 or more employees) were the most satisfied with their pay/income levels, with 55% stating that they were very or quite satisfied. This fall to 47% of all self-employed and 46% of all self-employed platform workers.

¹⁶ Respondents were asked 'How difficult do you find it to get work as self-employed?' (Single response).

Figure 14: Percentage of self-employed who are very satisfied/quite satisfied with their current working situation¹⁷



Source: Ecorys analysis

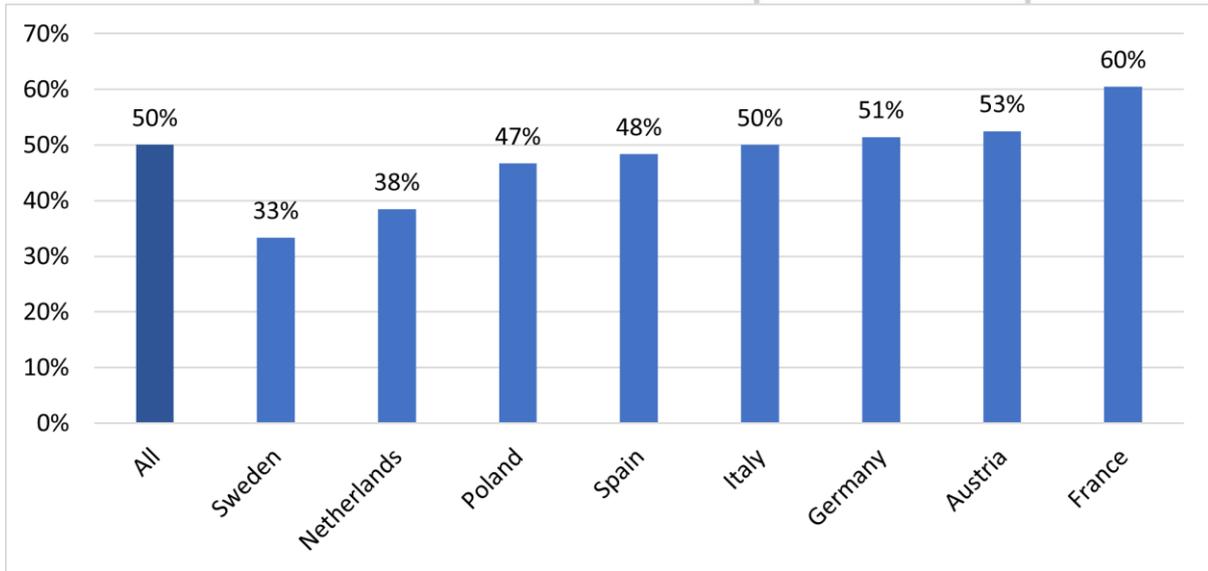
Of those who were overall very or quite unsatisfied with their work situation (a total of 8%)¹⁸, half said this was due to poor pay, while just under half (47%) said their work situation was precarious. While poor pay is a key reason across all countries (Figure 15), the percentage stating a precarious working situation as a reason varied a great deal by country, from 0% in Sweden to 74% in Italy (Figure 16). Platform workers are the most likely to state poor pay as a factor, at 67% versus 50% of all self-employed.

Figure 15: Percentage who are very/quite unsatisfied with their work situation due to poor pay¹⁹

¹⁷ The survey asked “In your work as a self-employed worker, how satisfied are you with your current working situation in respect of X:” The possible answers were on a scale from: *Very satisfied, Quite satisfied, Neutral, Unsatisfied, Very unsatisfied, Don't know (single response)*.

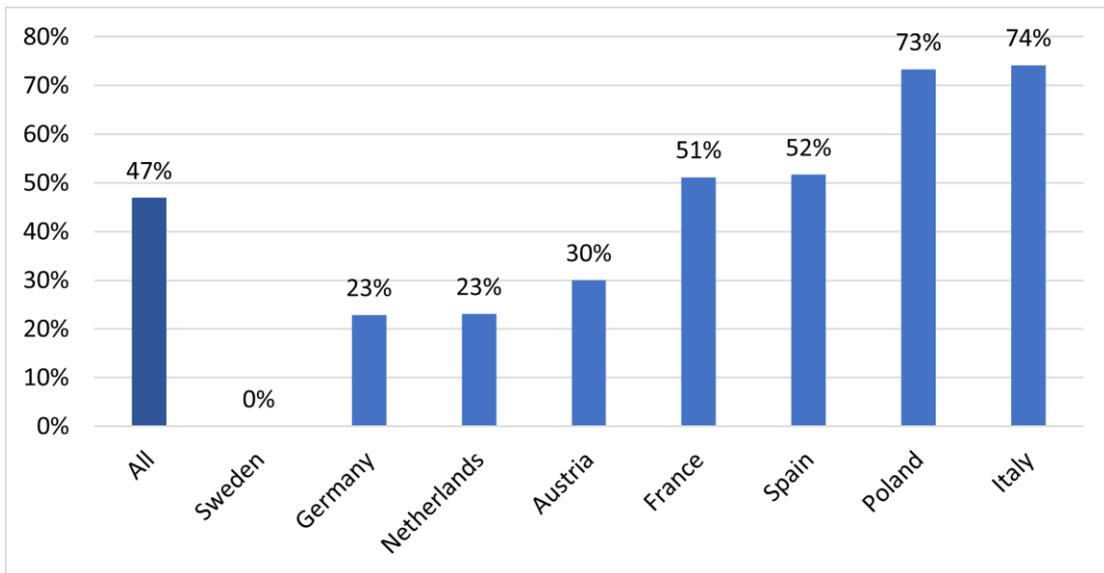
¹⁸ A further 22% were either neutral or unsure of their level of satisfaction.

¹⁹ Respondants who noted that they were very/quite unsatisfied with their self-employment work overall, were asked the follow up question ‘what is the reason(s) for your answer?’ (multiple response).



Source: Ecorys analysis

Figure 16: Percentage who are very/quite unsatisfied with their work situation due to a precarious work situation²⁰

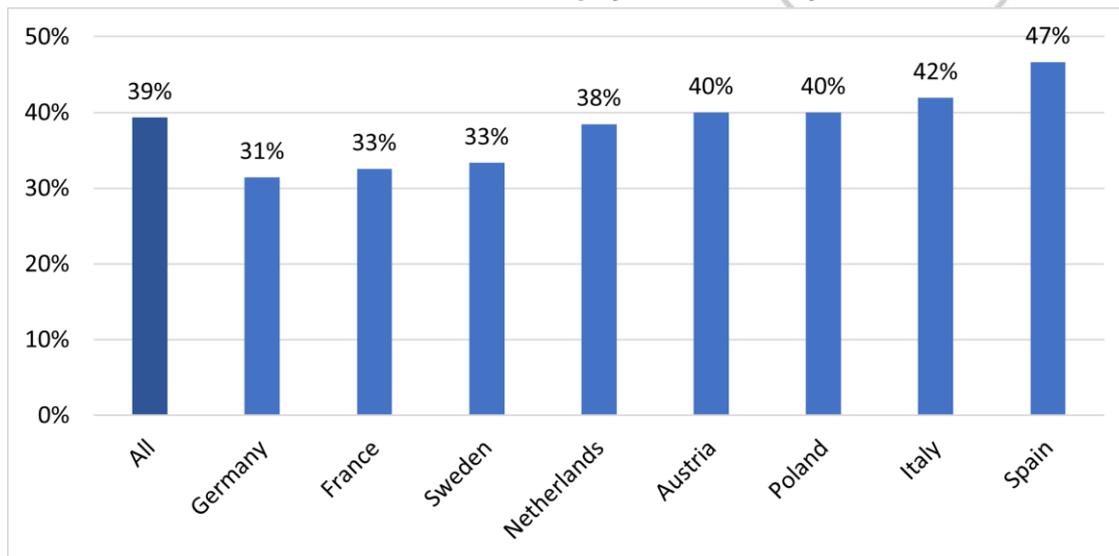


Source: Ecorys analysis

Around 40% of workers said lack of control about pay level/revenue per month made them unsatisfied, whilst almost a third (32%) said fear of losing work contributed to their feelings of dissatisfaction. Figures 17 and 18 show how these percentages vary by country.

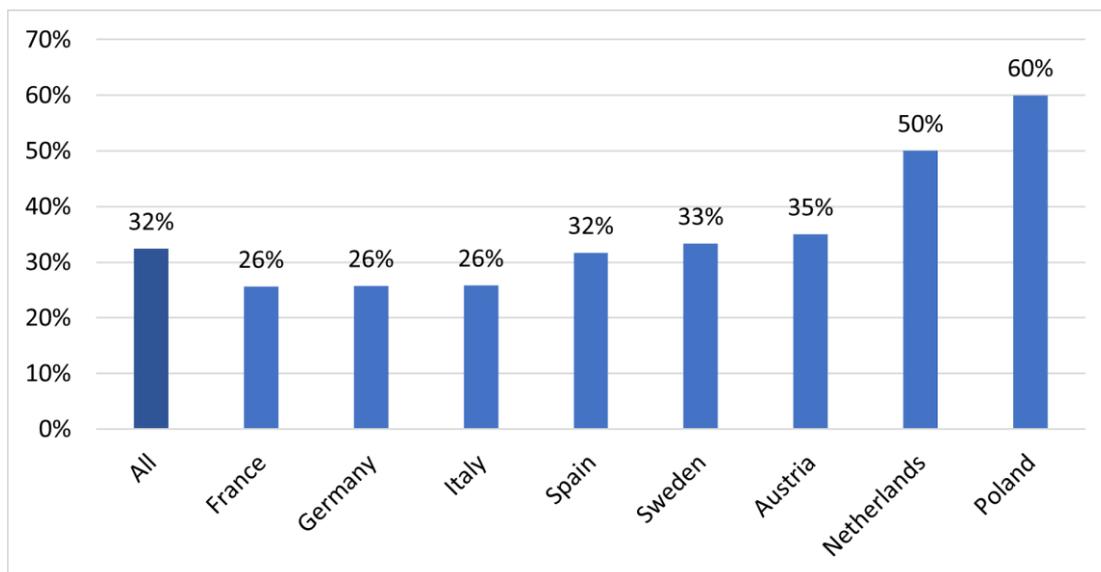
²⁰ Respondents who noted that they were very/quite unsatisfied with their self-employment work overall, were asked the follow up question 'what is the reason(s) for your answer?' (multiple response).

Figure 17: Percentage of self-employed who are very/quite unsatisfied with their work situation due to a lack of control around pay level/monthly revenue²¹



Source: Ecorys analysis

Figure 18: Percentage of self-employed who are very/quite unsatisfied with their work situation due to a fear of losing work²²



Source: Ecorys analysis

Self-employed platform workers were the least likely to cite fear of losing work as a reason for their dissatisfaction, at 23% versus 32% of all self-employed and 38% of the self-employed working for large clients.

Other reasons given for feeling unsatisfied overall included work pressure (24%), a lack of transparency regarding platforms' policies (12%), and a lack of control over work organisation (9%). Compared to other countries the percent stating a lack of transparency was particularly high in Spain (23%), while the percent stating a lack of control over work organisation was high in the Netherlands (19%).

²¹ Respondents who noted that they were very/quite unsatisfied with their self-employment work overall, were asked the follow up question 'what is the reason(s) for your answer?' (multiple response).

²² Respondents who noted that they were very/quite unsatisfied with their self-employment work overall, were asked the follow up question 'what is the reason(s) for your answer?' (multiple response).

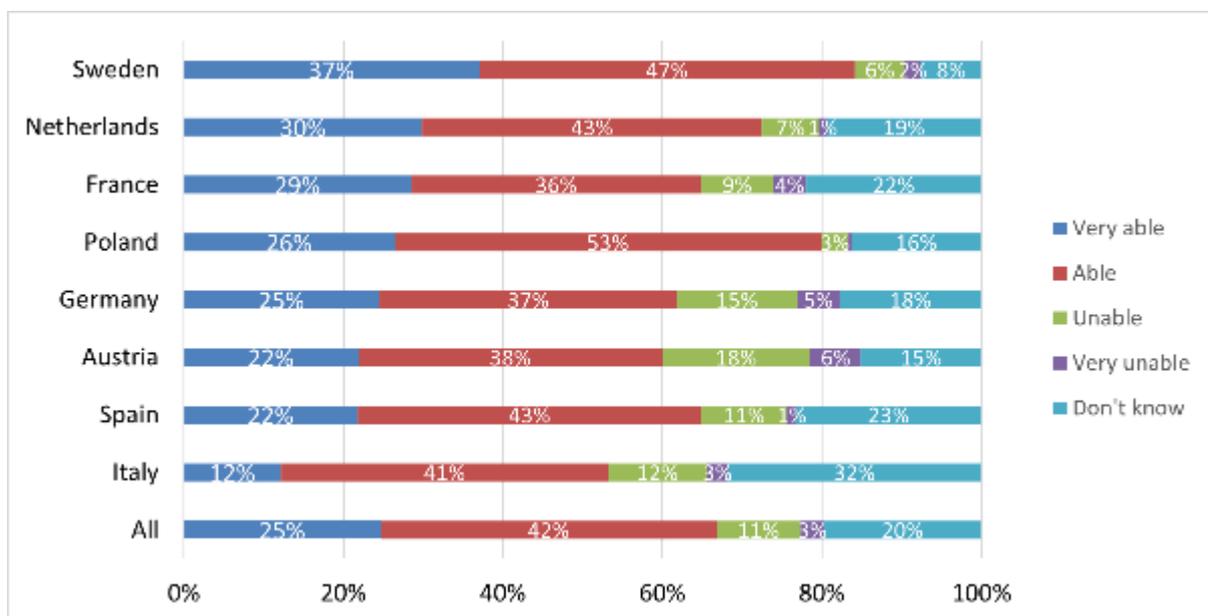
Only 14% of the self-employed are covered by an exclusivity clause that states that they cannot work for another employer/client or platform. This percentage is fairly stable across countries, ranging from 12% in Austria, France and the Netherlands, to 19% in Italy.

Views about negotiation power

Over two thirds of the self-employed felt very able or able to change their working conditions (67%). Overall, there is no relationship between the occupation of a self-employed worker and the likelihood of that worker feeling able or unable to change their working conditions. Results do vary by country however, with Sweden having the highest share of self-employed who feel very able or able to change their working conditions (84%) and Italy the lowest, at 53% (Figure 19). Around a third of the self-employed in Italy are unsure of their ability to impact on their working conditions, while 15% feel very unable or unable to change their working conditions.

Austria has the highest share of self-employed stating they feel unable or very unable to change their working conditions, at 25%. In all countries, the share of the self-employed who feel very unable to change their working conditions is 6% or less.

Figure 19: How able do you feel to change your current working conditions?²³



Source: Ecorys analysis

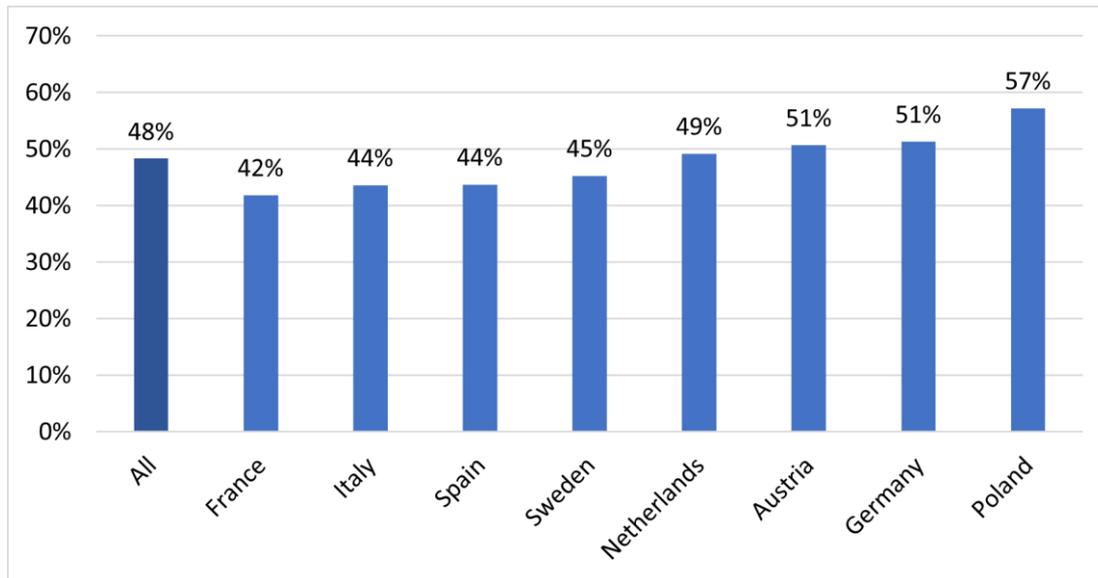
Respondents gave a range of reasons for feeling able to change their current working conditions, with the most popular being having a good relationship with clients (60%), the belief that the services they provide to clients are highly in demand (48%), and that they do not fear losing a contract if they raise the issue of working conditions (20%).²⁴ At the country level, these remain the most popular reasons, with the percentages saying they have a good relationship with clients close to the average of 60% in each country. Poland has the highest share of self-employed who feel that the services that they provide to clients are in high demand (57%), while France has the lowest, at 42% (Figure 20). In the Netherlands, only 16% agree that they feel positive about their ability to change their own working conditions due to not fearing losing a contract if they suggest changes (Figure 21). In Poland, this rises to 26%.

²³ Respondents were asked 'How able do you feel to change your current working conditions?' (Single response).

²⁴ Respondents who stated that they felt very able or able to change their working conditions were asked 'Why do you feel able to change your current working conditions?' (Multiple response).

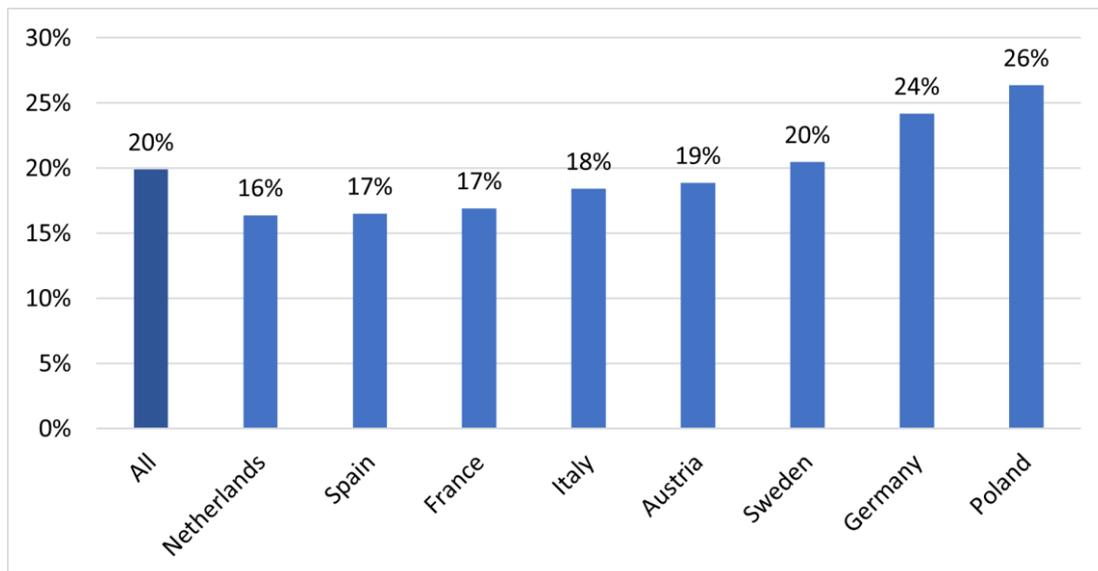
In France, around a quarter of respondents also noted that there is little to no competition in their sector, so they feel able to change their own working conditions. In Poland, only 7% gave this as a reason (Figure 22). Other reasons given included being part of a trade union/workers collective/professional order (5%), legal provisions covering working conditions protecting workers in negotiations with clients (5%), and the client having a system to adjust to worker's needs (6%). Percentage giving these reasons were low across all countries.

Figure 20: Percentage of self-employed who feel able to change their working conditions stating their services are in high demand by clients



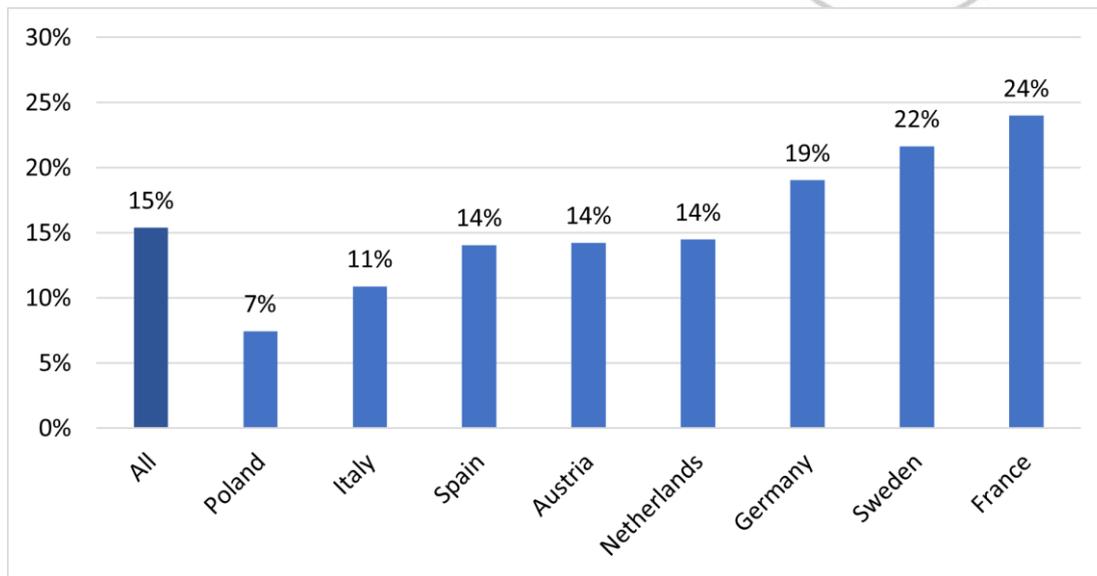
Source: Ecorys analysis

Figure 21: Percentage of self-employed who feel able to change their working conditions due to not being fearful of losing a contract



Source: Ecorys analysis

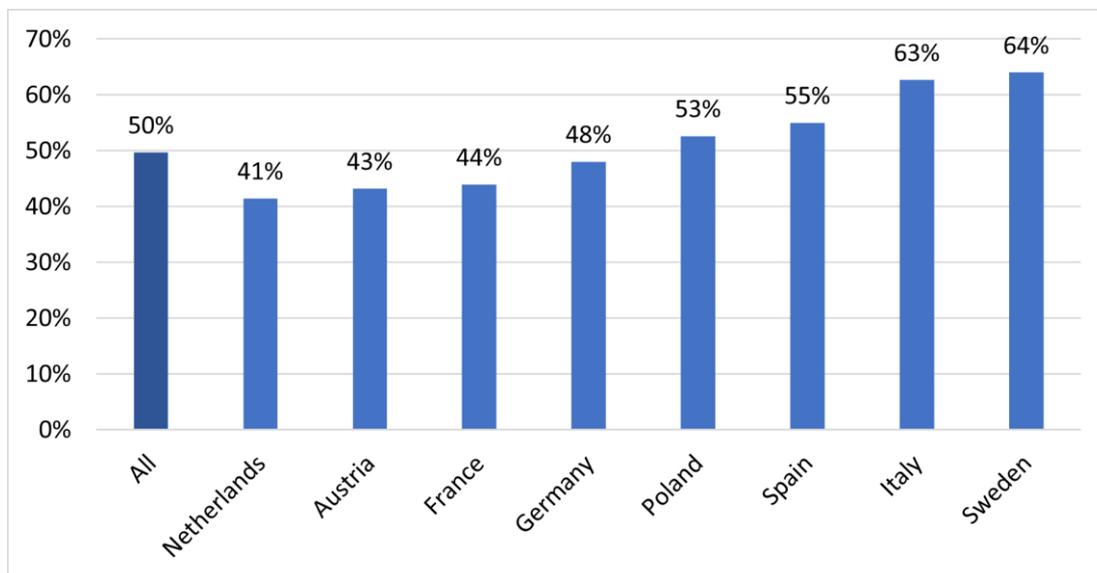
Figure 22: Percentage of self-employed who feel able to change their working conditions due to little competition in their sector



Source: Ecorys analysis

Along those who felt unable or very unable to change their working conditions, half (50%) stated this was due to a lot of competition in the sector they were working in. This was the top response in all countries, ranging from 41% in the Netherlands to 64% in Sweden (Figure 23).²⁵ Self-employed platform workers were the most likely to state a lot of competition as a reason for being unable or very unable to change their working conditions, at 61% compared to 50% of all self-employed.

Figure 23: Percentage of self-employed who feel unable to change their working conditions due to a lot of competition in their sector

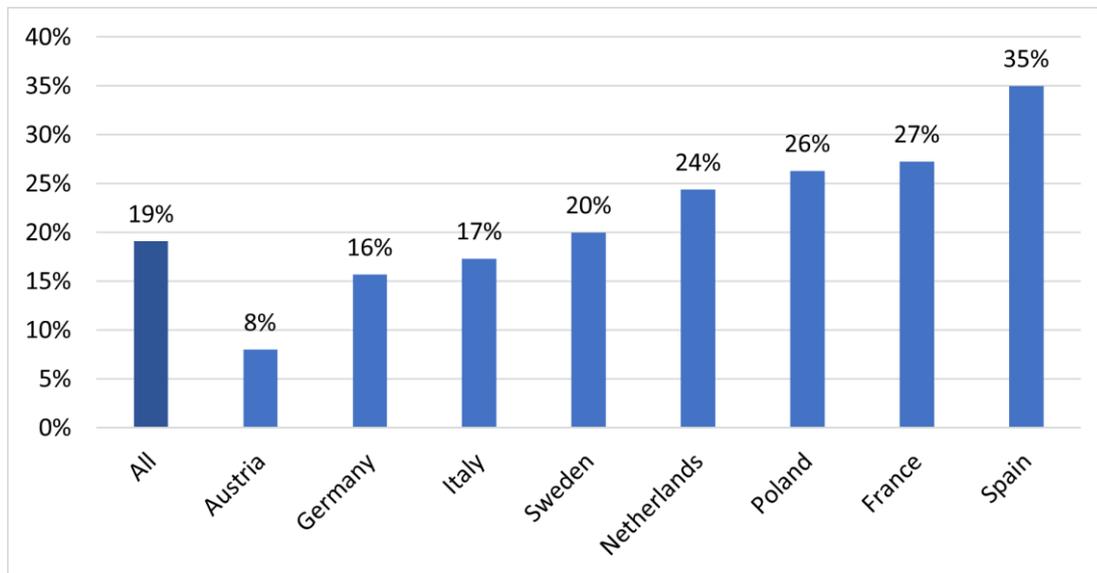


Source: Ecorys analysis

²⁵ Respondents who stated that they felt very unable or unable to change their working conditions were asked 'Why do you feel unable to change your current working conditions?' (Multiple response).

Under a quarter of the self-employed (19%) felt unable/very unable to make changes due to not being a member of a trade union/workers collective/professional order. This ranged from just 8% in Austria to over a third (35%) in Spain (Figure 24).

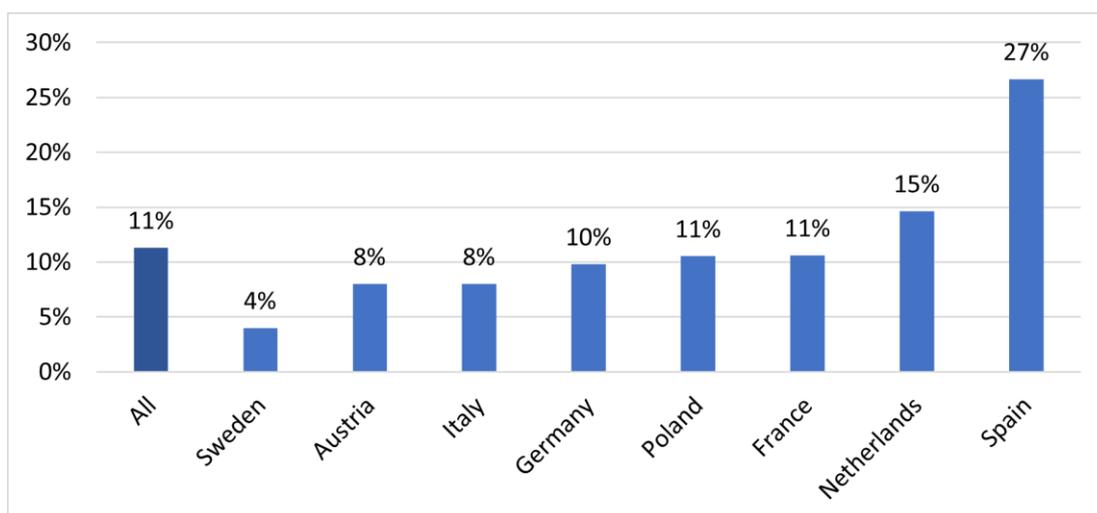
Figure 24: Percentage of self-employed who feel unable to change their working conditions due to not being a member of a trade union/workers collective/professional order



Source: Ecorys analysis

Just over one seventh (14%) noted that the services they provide are not highly in demand. This value was stable across all countries with the exceptions of Poland (21%) and Sweden (8%). Around one tenth (13%) feared losing a contract if they raised issues around working conditions. Apart from Poland, where nearly a third (32%) stated this as a reason, this figure was also stable across countries. In Spain, over a quarter reported that legal provisions such as laws and collective agreements did not protect them in negotiations with clients. In contrast, only 4% gave this as a reason in Sweden (Figure 25).

Figure 25: Percentage of self-employed who feel unable to change their working conditions due to a lack of protection in negotiations.

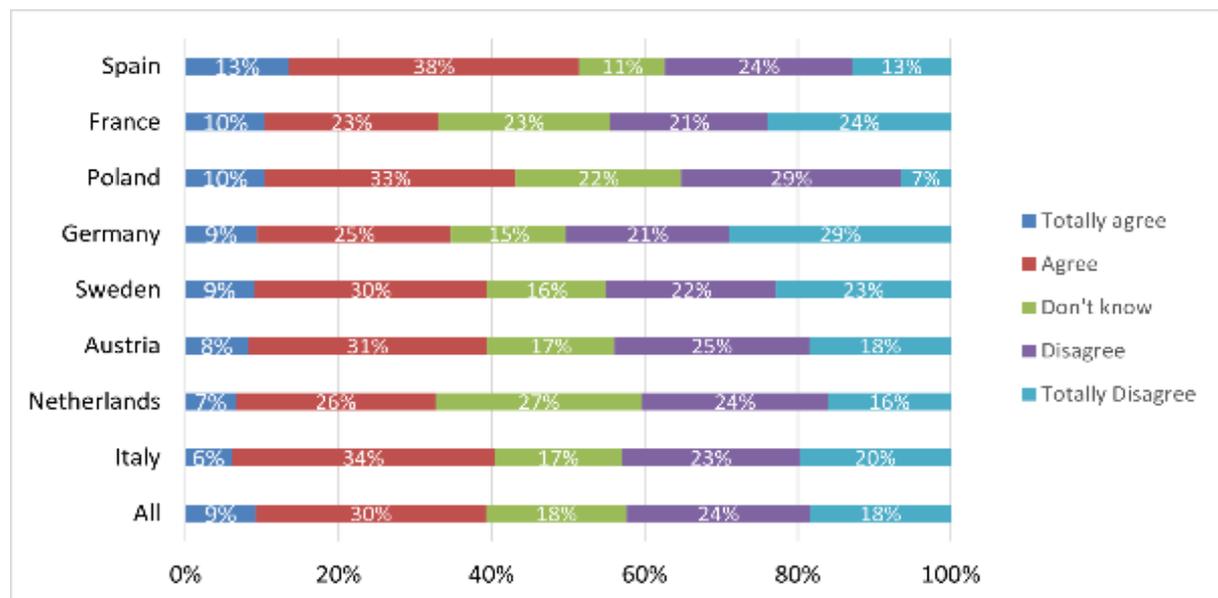


Source: Ecorys analysis

Other reasons given for feeling very unable/unable to change their own working conditions included the client not having an internal system to adjust to requests for changes in the working needs of the self-employed (10%) and bad relationships with clients (3%). These values were similar across all countries.

Overall, 39% of the self-employed agreed that collective actions - such as joining a trade union, strikes or collective bargaining agreements - are an effective way to improve their negotiation powers with clients (Figure 26). This value ranges from just of half (51%) in Spain to a third in France and the Netherlands. Germany has the highest share who disagree with this statement (50%). The share of people answering do not know ranges from 11% in Spain to 27% in the Netherlands. Respondents working for just one client were the most likely to agree that collective actions are effective, at 51% compared to 38% of those working for more than one client.

Figure 26: Do you agree that collective actions are an effective way to improve your negotiation?²⁶

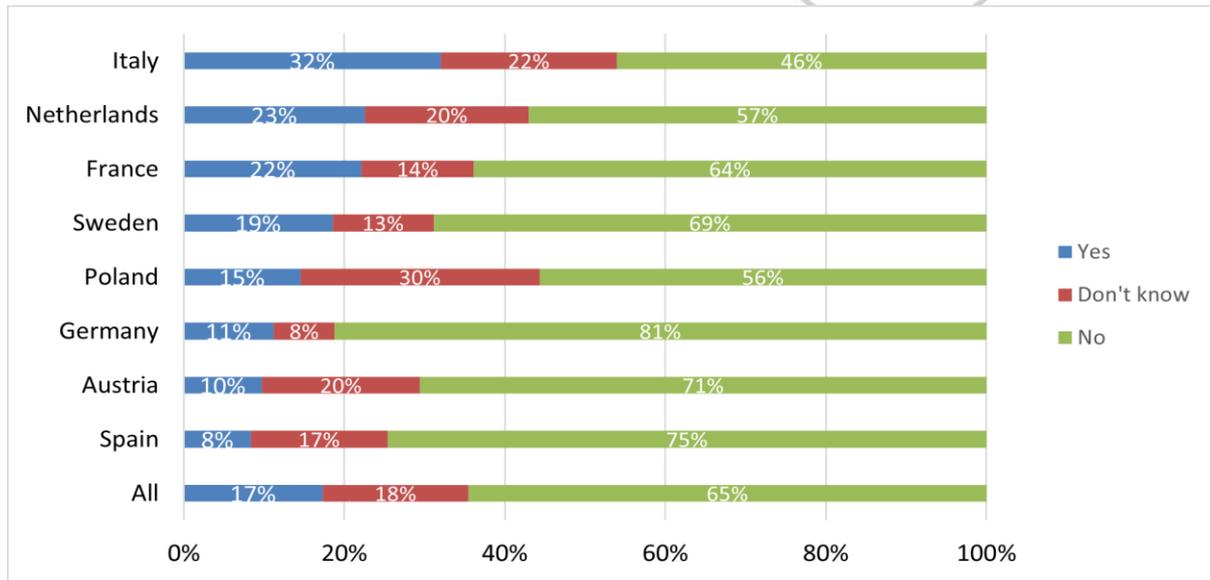


Source: Ecorys analysis

In all countries apart from Italy, more than half of the self-employed were unaware of any retaliation action against a company – such as a strike or a boycott - following a company’s refusal to negotiate with self-employed services providers (Figure 27). Italy had the highest share who had heard of some form of retaliation, at 32%.

²⁶ Respondents were asked ‘Do you agree that collective actions such as joining a trade union, strikes or collective bargaining agreements are an effective way to improve your negotiation power with your clients?’ (single response).

Figure 27: Are you aware of any retaliation action against a company following its refusal to negotiate with self-employed services providers?²⁷

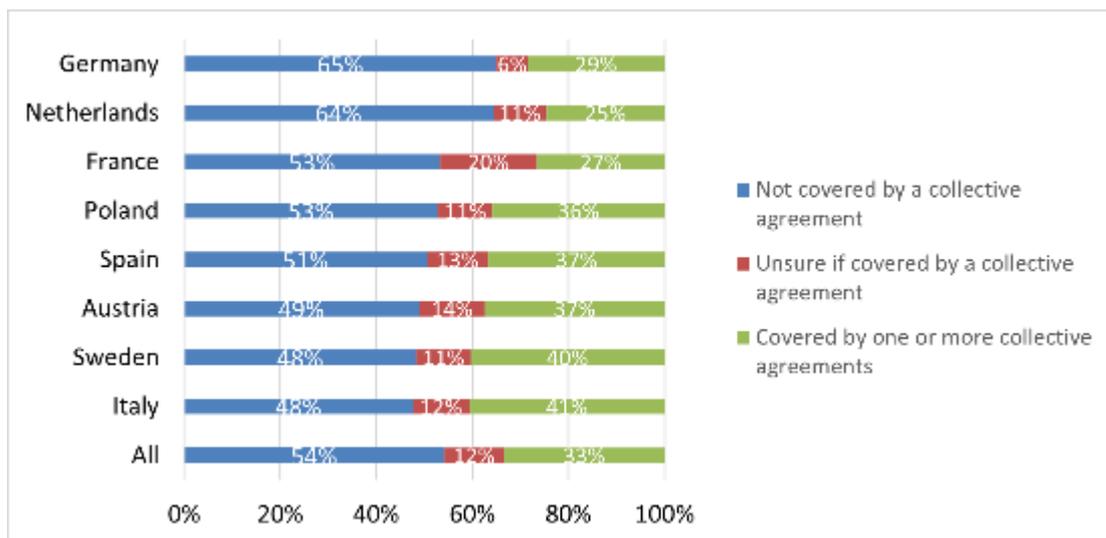


Source: Ecorys analysis

Coverage by collective agreement

In total just over one third of the self-employed noted that they were either permanently or occasionally covered by a collective agreement on hourly pay or other employment conditions (Figure 28). This figure does vary by country, and it should be noted that around 12% of the self-employed were unsure as to whether or not they were covered by a collective agreement (this rises to 20% in France). In addition, it may be that those stating that they are covered by a collective agreement are in fact just setting their own employment conditions based on those outlined in the collective agreements of employees, and are not actually legally covered by this agreement themselves. The percentage reporting that they are covered by a collective agreement is highest in Italy (41%) and lowest in Germany (29%).

Figure 28: Percentage of self-employed covered by a collective agreement²⁸



²⁷ Respondents were asked 'Are you aware of any retaliation action against a company following its refusal to negotiate with self-employed services providers (e.g. boycott, strike)?' (single response).

²⁸ Respondents were asked 'As a self-employed worker, are you permanently or occasionally covered by a collective agreement on hourly pay or other employment conditions?' (Multiple response, 'None of the above' and 'Don't know' were possible options).

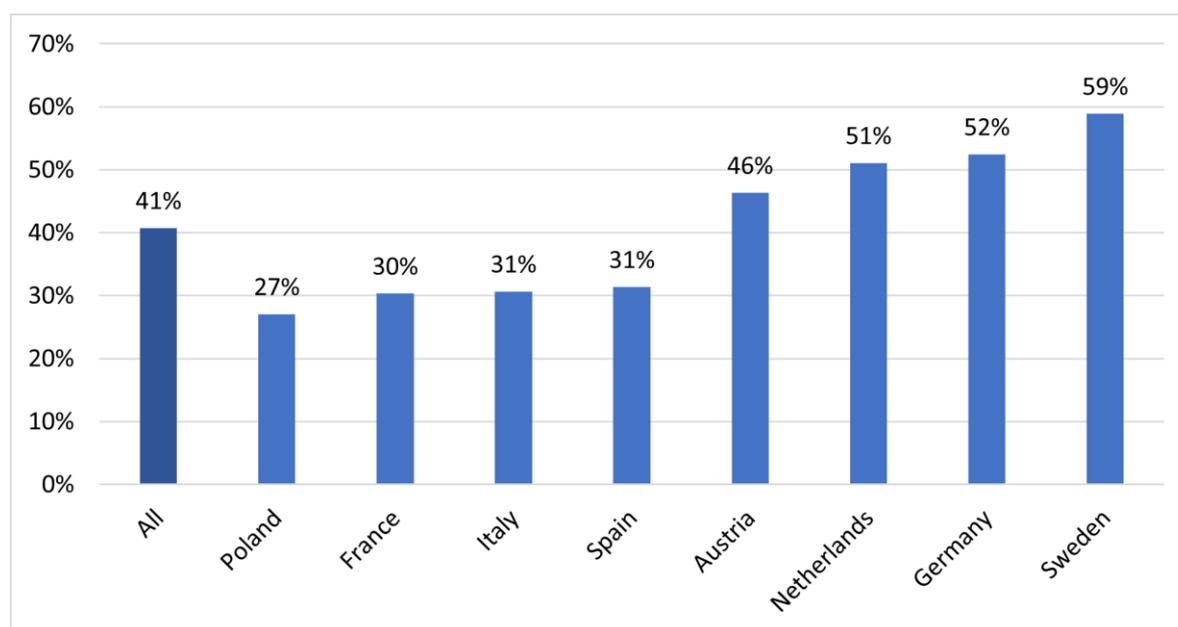
Source: Ecorys analysis.

Of those covered by a collective agreement, just over half of these were extension to existing collective agreements to self-employed or platform workers. There is little variation between countries on this measure. Those covered by a collective agreement worked in a very wide range of sector. The most selected were the healthcare/medical (6%), advertising (6%), and construction/building materials sectors (6%).

The working conditions most commonly covered by these collective agreements were pay rates (52%), working time (48%), and health and safety (43%). A third of respondent noted that holiday pay was covered, while around a quarter stated that their agreement covered sick pay (28%) and/or pensions (24%).

For those not covered by a collective agreement, the most popular reasons were that an agreement was not relevant for them (41%) and that collective agreements do not cover the type of work they do (31%). The percentages noting that collective agreements were not relevant for them ranged from 27% in Poland to 59% in Sweden (Figure 29). Austria had the lowest percentage reporting that collective agreements do not cover the type of work they do (19%), while all other countries were close to the average value of 31%.

Figure 29: Percentage of self-employed not covered by a collective agreement due to such an agreement not being relevant to them²⁹



Source: Ecorys analysis

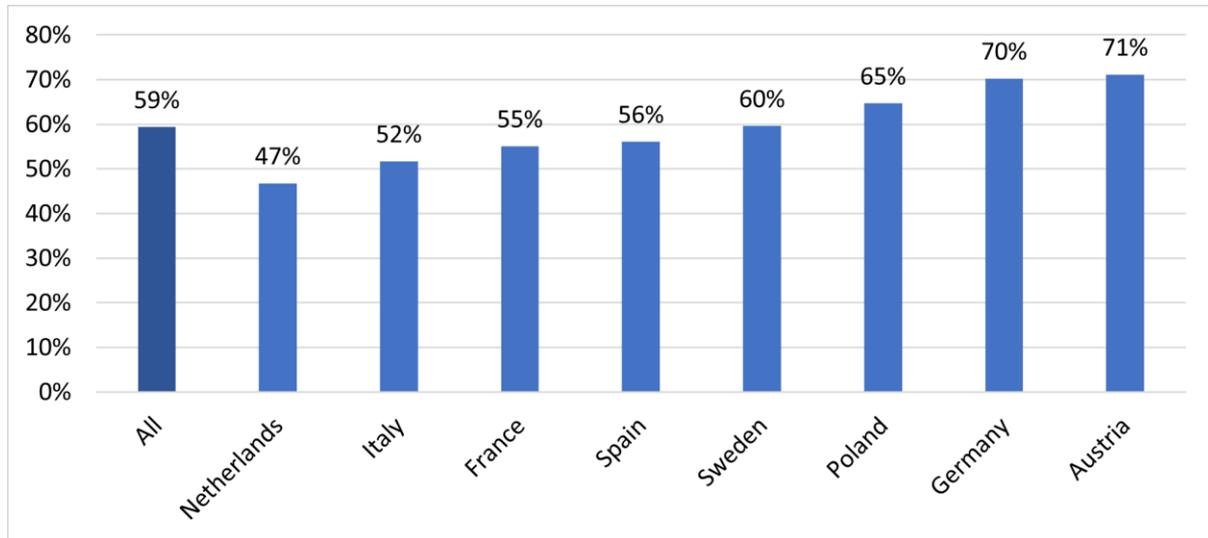
Other reasons given included no parties to negotiate a collective agreement (12%), such as agreement being difficult to enforce (7%), the client/platform not being covered by/not party to the agreement (6%), that such an agreement was illegal (3%), and worry that many other platform workers would opt out (1%) or shift to other platforms (2%). Less than 1% had opted out of a collective agreement. The percentages given these reasons were low across all countries.

Among those who opted out of a collective agreement, over half stated that this was because such an agreement would not bring any benefits to themselves. This percentage was lowest in the Netherlands (47%) and highest in Austria, at 71% (Figure 3029).

²⁹ Respondents were asked 'If not covered by a collective agreement, why not?' (Multiple response).

Just over one tenth (11%) were worried that a collective agreement would have a negative influence on their flexibility, 9% were worried it would have a negative impact on their income, and 6% were worried about a negative impact on their working time. With the exception of Poland, these percentages varied little between countries. The self-employed in Poland were the most concerned about a negative impact on their flexibility (18%), income (15%), and working time (11%).

Figure 30: Percentage of self-employed opting out of a collective agreement due to a belief that such an agreement would not bring them any benefits³⁰

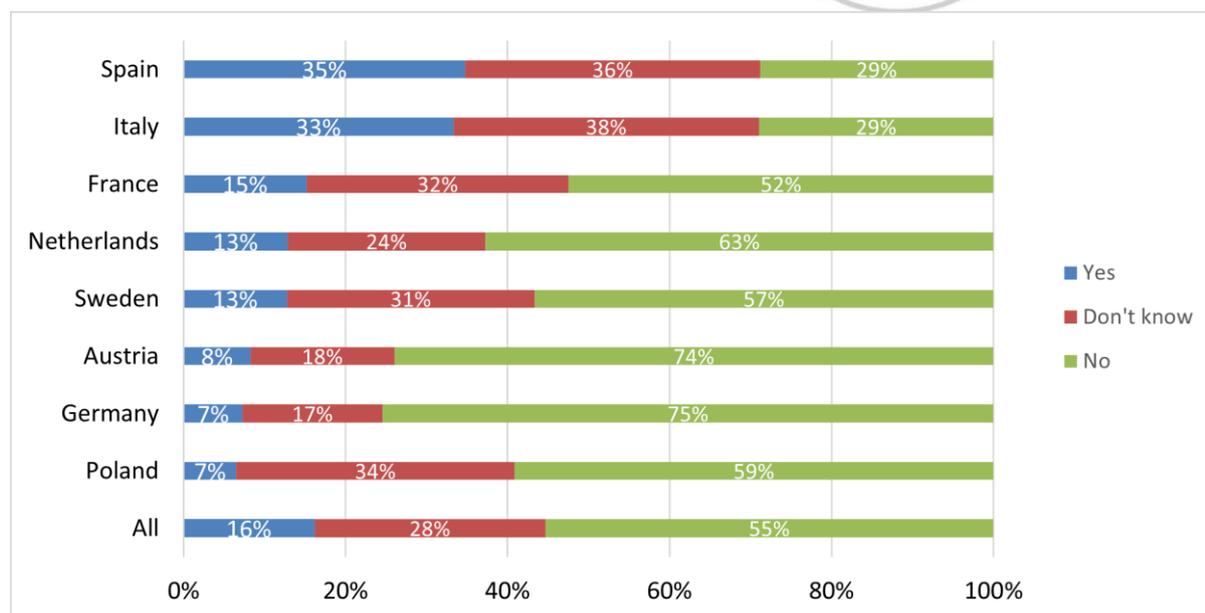


Source: Ecorys analysis

A minority of self-employed expressed an interest in being covered by a collective agreement (Figure 31). Support was highest in Spain and Italy, at around a third of the self-employed. While each country had a number of self-employed who were unsure if they wanted to be covered by a collective agreement, in the majority of countries over half stated that they did not want to be covered by a collective agreement. In Austria and Germany, this rises to around three quarters of the self-employed.

³⁰ Respondents were asked: 'If you have opted out of the collective agreement, why is this?' (Multiple response).

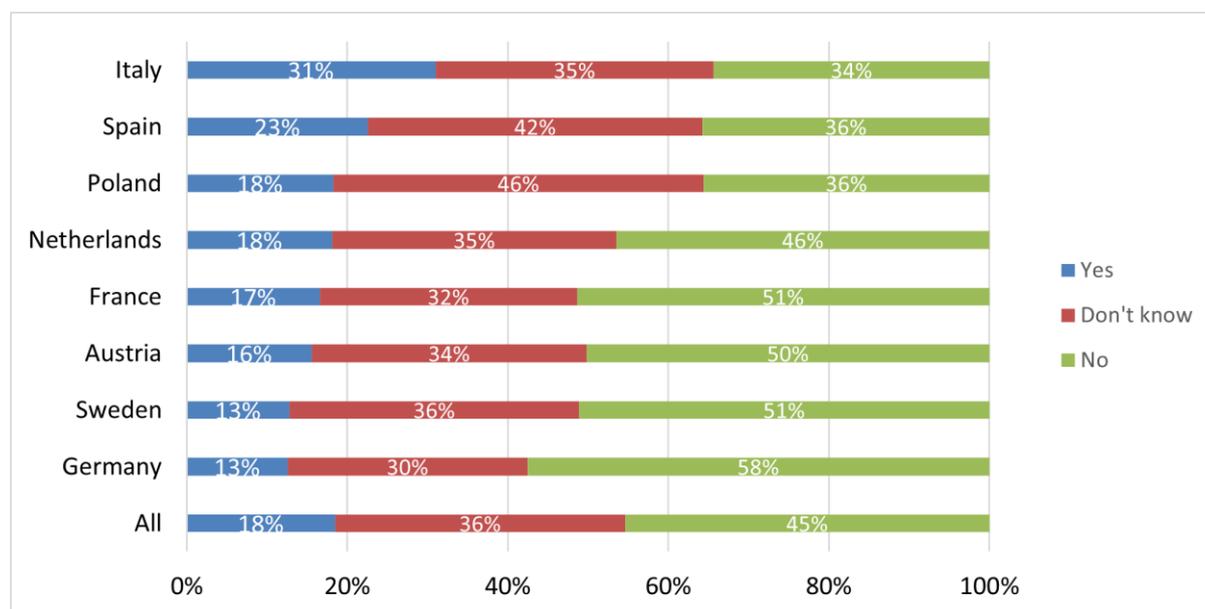
Figure 31: Would you like to be covered by a collective agreement?³¹



Source: Ecorys analysis

The percentage saying that a collective agreement would influence their decision about whether or not to carry on with their current working arrangements was similarly low (Figure 32). Around a third of the self-employed were unsure as to whether or not they would carry on with their current working arrangements.

Figure 32: Would coverage by a collective agreement influence your decisions about whether or not to carry on with your current working arrangements?³²



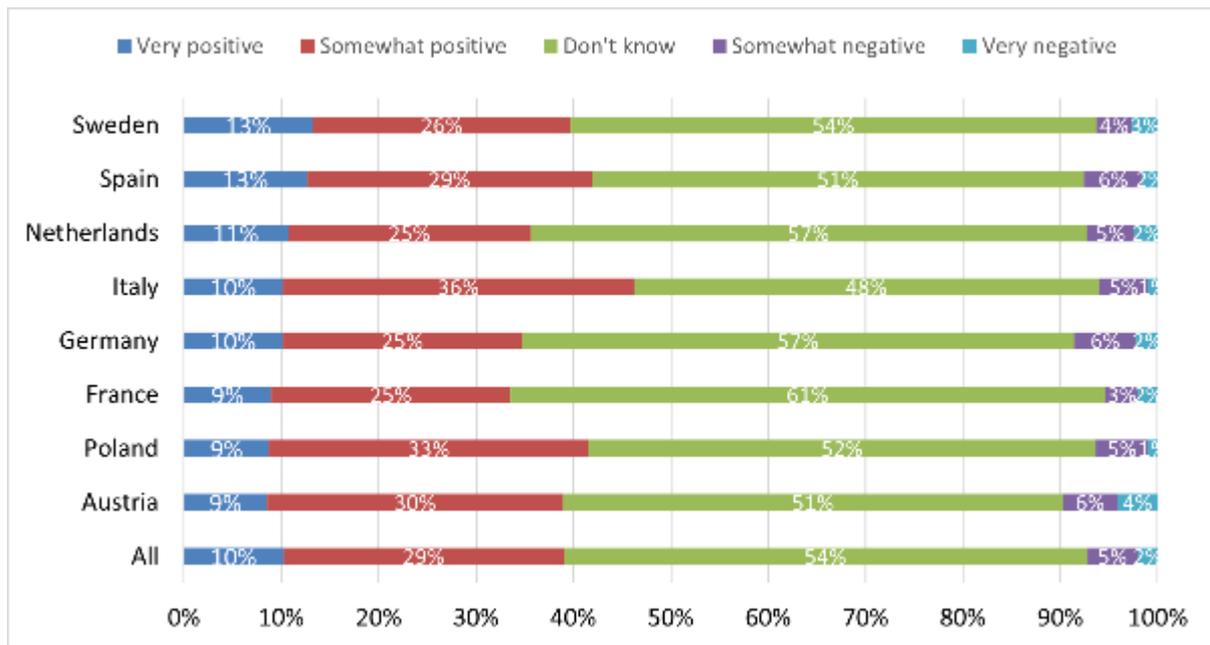
Source: Ecorys analysis

³¹ Respondents were asked 'Would you like to be covered by a collective agreement?' (Single response).

³² Respondents were asked 'Would coverage by a collective agreement influence your decisions about whether or not to carry on with your current working arrangements?' (Single response).

Overall 39% of the self-employed were either very positive or positive about the idea of an initiative to exclude from the prohibition of cartels collective agreements that regulate the working conditions of self-employed people. Italy was the most positive about such an initiative, with 46% feeling either very positive or positive. However, there was a good deal of uncertainty around the initiative in each country, with around half of more of the self-employed unsure if such an initiative would be positive or negative (Figure 33). The percentage who felt very negative or negative about the initiative was 10% or less in each country. Respondents working for just one client were the most positive about the initiative, with 51% very positive or positive, compared to 38% of those working for more than one client.

Figure 33: Views on the European Commission announcement of an initiative to exclude from the prohibition of cartels collective agreements that regulate the working conditions of self-employed people.³³



Source: Ecorys analysis

³³ Respondents were asked 'The European Commission has announced an initiative to exclude from the prohibition of cartels collective agreements that regulate the working conditions of self-employed people. What is your view on this?' (Single response).



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