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REPORT ON THE COMPARATIVE ANALYSIS OF DIGITAL PLATFORMS CASE STUDIES PLUS COMMENT OF THE REPORT BY PROFESSOR URSULA HUWS AS EXTERNAL EXPERT

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1. Introduction

The mapping conducted in the initial phase of this project has already highlighted that the domestic care and cleaning sector is undergoing a profound process of platformization, which reveals a considerable heterogeneity in both organizational models and working conditions. In order to interpret this complexity, we developed a typology of home care and cleaning platforms based on the intersection of two analytical dimensions (see Bonifacio and Pais, 2025).

The first dimension assesses the platform's role in regulating the employment relationship. In particular, we assessed whether the platform intervenes directly—acting as the employer—or indirectly—by handling the contractual and administrative aspects of the employment relationship on behalf of the client. While these configurations imply different contractual arrangements and entail varying levels of social protection for workers, we have nonetheless categorized both as forms of active platform involvement. In contrast, the platform is considered to not intervene in the contractualization when it merely connects workers and clients without offering any services to formalize the employment relationship.

The second dimension serves as a proxy for the degree of centralization in the platform's organizational structure. It evaluates whether the platform actively governs the matching process—by selecting or shortlisting the worker(s) deemed most suitable for a given job—or whether it adopts a more passive role, merely facilitating contact between clients and workers without exercising control over the final selection.

Crossing these two indicators, we constructed a typology composed of four ideal types of platforms (see table 1).

Table 1 The landscape of home care and cleaning platforms in 6 European countries (Bonifacio and Pais, 2025)

	Matching yes	Matching no	Tot.
Contract no	On-demand 10	Marketplace 31	41
Contract yes	Digital agency 24	Regulated marketplace 4	28
Tot.	34	35	69

To further explore the differences between these platform models, we conducted in-depth case studies – two in each of the six participating countries. In this report, we have chosen to present the main findings according to platform type rather than national context. This analytical strategy allows us to foreground the organizational logics underpinning each model and their consequences on workers' conditions, in order to identify recurring patterns, tensions, and divergences both within and across the identified ideal-types.
The report is structured as follows. The next section provides a synthesis of the research methodology. Sections three, four, and five offer an in-depth analysis of each platform type. The report concludes with some final remarks.

2. Methodology

The case selection aimed to reconstruct as comprehensively as possible the heterogeneity of this sector, by including platforms that represent different organizational models and provide home care and/or cleaning services. Each national research unit conducted two case studies – with the exception of Spain and Ireland, which conducted one additional case study each – and produced a detailed report for each case. Table 2 provides an overview of the platforms analysed, reporting the country, the service(s) provided, the platform type, and the empirical material collected. For reasons of privacy, the French platforms are anonymized as French Case 1 and French Case 2.

During the research design phase, a case of on-demand platform was included; however, over the course of the empirical investigation, it became apparent that the platform more closely resembled the operational model of a digital agency. This report therefore focuses on three platform types: marketplaces, digital agencies, and regulated marketplaces.

All cases were analysed using a common methodological framework, which enabled cross-cases comparison across a set of shared dimensions Also, to enhance comparability across cases, a preliminary standardization of research instruments – particularly the interview guides – was carried out. Cases studies were realized trough semi-structured interviews with various platform stakeholders – managers, workers, and clients – and through desk analysis of the platforms interface, their terms and conditions, and other publicly available online sources.

The comparative analysis was subsequently carried out through the examination of each case study report. Due to privacy constraints, we did not have access to the full research outputs of each case (interview transcripts and related materials). The analysis focused on four key dimensions: (1) the historical development of the platform; (2) its organizational and managerial structure; (3) working conditions; (4) workforce composition and professional identity. The structure of this comparative report mirrors these analytical dimensions.

Table 2 Case studies details

Nation	Platform name	Platform type	Service(s) provided	Methods
Netherland	Hlprs/hups	Digital Agency	Carergiving and cleaning	One interview with a platform manager One interview with a platform worker Two interviews with platform clients
Netherland	Homeworks	Digital Agency	Cleaning	One interview with a platform worker One interview with a platform client
Italy	Baze	Digital Agency	Caregiving and cleaning	Two interviews with the platform CEO Four interviews with platform workers Two interviews with platform clients
Italy	Helpling Italia	Marketplace	Cleaning	Informal exchanges via email with the platform's Head of Operations Four interviews with platform workers Two interviews with platform clients
Ireland	Care.com Ireland	Marketplace	Caregiving and cleaning	Five interviews with platform workers
Ireland	Helpling Ireland	Marketplace	Caregiving and cleaning	One interview with a platform manager Five interviews with platform workers
Ireland	Home Care Direct	Regulated Marketplace	Caregiving	Two interviews with a platform manager Four interviews with platform workers
France	French Case 1	Marketplace	Caregiving	One interview with a platform manager Two interviews with platform workers
France	French Case 2	Digital Agency	Caregiving and cleaning	One interview with a platform manager Three interviews with platform workers
Spain	Cuideo	Digital Agency	Caregiving	One interview with a platform manager Two interviews with platform workers
Spain	Senniors	Digital Agency	Caregiving	One interview with a platform manager One interview with a platform worker
Spain	Care.com Spain	Marketplace	Caregiving and cleaning	Two interviews with platform workers
Denmark	Care.com Denmar	Marketplace	Caregiving and cleaning	One interview with a platform worker Two interviews with clients of private market-based home care One interview with a caregiver formerly employed as a freelancer by a company
Denmark	Hilfr	Regulated Marketplace	Cleaning	One interview with a platform manager Two interviews with platform workers One interview with a platform client

3. Digital marketplaces

The *Marketplace* model is the more closely aligned with the mainstream ideal-type of digital labour platform. It is characterized by low entry barriers and lean managerial structures, and enrol workers as independent contractors. As explained in the Introduction, this is the most prevalent model of platform in the home care and cleaning sector in the countries included in the analysis. The quantitative dominance of this model is also mirrored in the cases analysed in this report.

The six marketplace platforms analysed are located in five of the six countries that are part of the project – with the exclusion of the Netherlands. It is important to highlight that the analysis focused on three companies: Care.com (caregiving and cleaning services), Helpling (cleaning services), and French Case 1 (caregiving services). Care.com and Helpling were intentionally examined across multiple countries (respectively, Denmark, Ireland and Spain for Care.com, Ireland and Italy for Helpling), as existing literature has already highlighted how multinational platforms may adapt their organizational models to specific national contexts. However, as we will demonstrate in the following section, a cross-national comparison of the same platform operating in different countries did not reveal any noteworthy differences.

A major challenge in examining these platforms stems from their structural opacity, largely due to management's reluctance to engage with the research or to provide reliable data. As widely recognized by platform labour scholars, this informational opacity poses significant obstacles for both sociological inquiry and regulatory oversight. In the case of Care.com, for example, due to the unavailability of the management for interviews, it proved difficult to gain insight into the number of individuals actively working through the platform.

3.1. The platforms' background

A distinguishing feature of marketplace platforms is that they frequently operate across multiple national contexts. According to our mapping analysis, the majority of platforms active in more than one country are indeed classified as marketplace platforms: 14 out of 17, with the remaining three consisting of two digital agencies and one regulated marketplace. Among the six cases in this section, five are national branches of multinational platforms (Helpling Ireland, Helpling Italy, Care.com Denmark, Care.com Ireland, and Care.com Spain), while French Case 1 operates on a national level.

An analysis of these platforms' geographical expansion reveals important aspects of their developmental trajectories. Those operating on an international level – Care.com and Helpling – have followed the prototypical growth pathway of digital start-ups, characterised by the construction of a highly standardised and scalable organisational model. This model can be rapidly replicated across different contexts and is particularly appealing to venture capitalists and investment funds. In the case of *Care.com*, which may be currently considered the largest digital platform in the care and domestic work sector worldwide, international expansion has been closely linked to processes of financialization. Launched in the United States in 2007, the platform swiftly extended its operations to Canada, the UK, and several Western European countries. In 2019, it was acquired for approximately €500 million by IAC, a holding company specialised in the acquisition of digital brands. Similarly, *Helpling* was founded in Germany in 2014 and expanded into 12 countries within its first year of operation. Unlike Care.com, Helpling's internationalisation strategy was largely based on the acquisition of existing companies and start-ups operating in these sectors. For instance, the platform's entry into the Irish and UK markets was facilitated by the acquisition of Hassle.com. These dynamics of market concentration based on mergers and acquisitions have been widely observed across other economic sectors undergoing platformization processes, such as food-delivery and ride-hailing. Typically, such strategies are driven by the strategic imperative to appropriate key assets – most notably technological infrastructure and an established customer base – which constitute main sources of value within financialised platform capitalism.

The international scalability of these platforms is closely related to their organizational model. The open structure, the classification of workers as self-employed, and the adoption of lean managerial systems all contribute to minimising the costs associated with market entry. In this respect, Care.com is a paradigmatic example: despite operating in several European countries, it has a single European headquarter in Germany and does not employ permanent staff in the countries where it operates.

In contrast, French Case 1 represents a more recent initiative (founded in January 2021) and currently operates solely at the national level. It has not yet attracted venture capital investment but has been supported by a business angel for technological development. Although structurally akin to the marketplace model – a fully digital company with a small managerial team of six individuals distributed across different cities – French Case 1 reflects a distinctive orientation. As will be further elaborated below, the platform's development trajectory and core business model suggest a unique focus on the provision of training initiatives.

Notwithstanding these differences, all six platforms exhibit a common territorial characteristic: the services they offer tend to concentrate in the largest urban centres of the countries in which they operate. As noted by the Helpling manager, this concentration dynamic is not episodic, but primarily due to the limited request of matching services, where domestic care and cleaning work is more likely to remain embedded in informal networks or governed by traditional, proximity-based arrangements. The evolution of Helpling's operations in Italy illustrates this pattern clearly: after being launched in 14 cities, the platform narrowed its focus to three metropolitan areas – Milan, Rome, and Turin. In the Irish context, platform's operations are mainly concentrated in Dublin and Cork because, according to the manager interviewed, expanding in smaller and rural areas would require marketing investments disproportionate to the potential returns.

This tendency towards urban concentration can be interpreted as a preliminary evidence of the embeddedness of this type of domestic work platforms within existing labour market structures. Rather than radically disrupting their structural characteristics, platforms seem to adapt to their specific socio-economic and spatial configuration.

3.2. The marketplace operational model

As previously noted, digital marketplace platforms are characterized by a lean managerial structure and by the absence of physical offices. The intermediation between labour supply and demand, alongside core organisational processes such as workers recruitment and evaluation, is governed – or, more precisely, enabled – through a digital infrastructure.

3.2.1. Recruitment

Marketplace platforms do not foresee traditional recruitment processes, but allow both clients and workers to freely register on the platform. During the registration process, users are typically encouraged to create as complete a profile as possible in order to enhance their visibility and to construct the image of a safe and professional marketplace. For example, the Helpling manager interviewed emphasised the importance of uploading a 'friendly' profile picture, which is deemed essential in attracting potential clients. Marketplace platforms generally do not conduct thorough checks on workers' credentials, qualifications, or prior experience. Rather, they limit their vetting to verifying formal eligibility to work – e.g. the possession of valid ID. Helpling performs an additional final step – named by the platform manager a "welcome call" – which precedes the activation of the user profile. The French 1 case also takes a similar approach. As explained by its founder, the platform does not make a selection *ex ante*, since requesting formal qualifications may create an entry barrier for individuals without certified training or prior experience in the sector. The structural openness of marketplace platforms and their limited involvement in verifying workers' profiles and credentials highlights the minimal accountability of this model with regard to the quality of services provided[1].

The analysis of the registration process provides also valuable insights into how workers are configured within the platform's organisational model. The case of Care.com illustrates how both workers and clients are indifferently framed as *users*. When accessing the platform for the first time, individuals are asked to indicate whether they are seeking a helper or a job. This initial binary choice directs them toward a registration pathway that requires the specification of profile details – including name, photo, years of experience, and postal code – as well as information concerning the services sought or offered, such as availability, hourly rate, and the nature of the services involved.

3.2.2. The platforms' business model

[1] Some unintended consequences of this model have been reported in the analysis of the Care.com Ireland: in 2019, a Wall Street Journal investigation revealed that the platform allowed caregivers with criminal records to access it, leaving clients responsible for either personally verifying workers' credentials or purchasing background checks as an additional paid service.

In general terms, the limited control exerted by marketplace platforms over workers' vetting and registration reflects a common business strategy oriented at attracting the highest number of users to maximise economic transactions and generate network effects. Interestingly, all six platforms share this approach, despite relying on different revenue sources.

Care.com operates on a premium subscription model, charging clients and workers a monthly fee. While clients can register for free, they need to pay a premium subscription to access caregivers' detailed information, contact them and post their job listings. On the workers' side, the premium plan enables them to respond to job listings posted by clients. Helpling employs a transaction-based revenue model, retaining a commission fee on each economic transaction intermediated through the platform.

The most distinctive and diversified business model, however, is that of French Case 1. Similar to Care.com, the platform charges workers a monthly fee to have their profiles present on the digital interface, as well as to receive support and advice on various matters. Clients are also charged a subscription fee to access additional services. However, according to the founder, the platform's main source of revenue concerns the selling of training services directed at both workers and families. These services are specifically designed to inform them about the regulatory tools available for managing employment relationships within the French context.

3.2.3. The matching process

In line with marketplace logic, these platforms do not directly oversee the matching of labour supply and demand. In all six cases examined, the matching process is initiated by the client and completed by the worker.

In Care.com and Helpling, the matching process is initiated by the clients, who indicate their specific needs – e.g. the type of service requested, the date and duration, and the geographical area where the service should be delivered. Based on this information, the platforms provide clients with a list of worker profiles from which they can select the most suitable to their needs. In both cases, platforms do not directly select a worker, but generate a hierarchy of potential matches. Interestingly, as noted in the Care.com Denmark report (Bjerre and Ilsøe, 2025), the way the platform presents the list of potential matches is similar to Tinder's matching system. Worker profiles are presented one at a time, and clients must indicate whether they are interested – by selecting a 'tick mark' – or not – by selecting a 'cross'. The variables considered by algorithms and their relative weights in the decision-making process remain structurally opaque, but the interview with the Helpling manager provided some insights in this respect. In addition to logistical parameters such as the location and time of the service, algorithms also consider indicators of workers' reliability (such as client reviews, appointment cancellations and response rates to job offers) as well as their overall experience with the platform (e.g. the number of completed appointments). In this vein, the algorithmic matching system undermines the autonomy promised by digital platforms, favouring workers who perform best according to standards unilaterally defined by the platform — typically, being active and reliable in relation to clients. Moreover, as explained by the Helpling manager to the Irish research unit (Murphy et al., 2025), these expectations are not only embedded in the algorithmic architecture, but are also explicitly conveyed by the management through other means of communication, such as email: *"if you accept an offer, it's important to actually go. If you have problems, contact the customers to explain what's happening, it's maybe easier to move the appointment instead of disappearing" (Helpling manager).*

In the case of French Case 1, clients can either contact workers directly or choose to make their job offer visible to all registered workers. In this case, the platform does not actively participate in the selection process but supports families in defining the job listing in terms of needs, type of services required, conditions under which the work will be carried out, in order to provide workers with all the necessary information to decide whether to accept or decline the job proposal. Interestingly, once the match is accomplished, users are allowed to exchange personal contact information. This highlights the absence of the lock-in mechanisms commonly employed by digital labour platforms—such as the concealment of direct communication channels—which are, however, difficult to enforce in work settings where interactions take place face-to-face and it is relatively easy for workers and clients to bypass the platform's intermediation after the initial contact.

3.2.4. The reputational system

The analysis of the registration and matching processes shows that, while platform workers are formally granted the right to accept or decline job offers, they are subtly steered towards aligning their behaviour with platform expectations in practice. One of the most effective tools through which this indirect pressure is exerted on workers is the reputational system, which functions as a main mechanism of labour control.

On Care.com and Helpling, clients are required to leave a numerical rating on a scale from 1 to 5 and are given the option to add a written review. These ratings do not merely provide the platform management with information on service quality; they are also publicly displayed on workers' profiles and directly influence their position within algorithmic visibility hierarchies – which in turn determines their job opportunities. In contrast, in the case of French Case 1, client ratings and comments are not made visible. As emerged from the interview with the platform's founder, this is based on the assumption that client evaluations do not necessarily reflect the actual quality of the service provided but are often shaped by interpersonal tensions and conflicts arising in the employment relationship (Poblete et al., 2025).

What all six marketplace platforms examined here share, however, is the asymmetric nature of the reputational system, which enables clients to evaluate workers, but not the other way around. This asymmetry should be understood as a deliberate organisational design choice, which transforms the technological tool of reputation into a proper instrument of decentralized labour control. As widely documented by the literature on platform work, such systems tend to place considerable pressure on workers, heightening the relational and emotional labour required to pacify the algorithms and meet client expectations. For instance, the analysis of Care.com Spain indicates that reputational pressures often disincentivise caregivers from asserting their rights or insisting on adherence to pre-agreed terms of work, including assigned tasks, working hours, and compensation (Molina and Casanovas, 2025).

The most critical issue of the marketplace reputational systems – and algorithmic evaluation more broadly – concerns their potential consequences in terms of accounts' deactivation. This issue critically emerged in the analysis of the case studies on Helpling Ireland and Helpling Italy, where researchers had the opportunity to interview the platform manager. According to her words, a series of unfavourable reviews does not directly produces a permanent deactivation, but may culminate in a temporary suspension. These suspensions are subject to a further evaluation and may be lifted or confirmed following a discussion between the worker and the platform management. Particularly revealing, however, is the managerial rationale underlying accounts' deactivation, which is legitimised as a strategic measure aimed at safeguarding the platform's public image. As reported in the Helpling Ireland report: "It happens that we had to deactivate people after like three very bad reviews [...] So, it can happen [...] Of course, the point is that the platform is based on reputation. If the reputation goes down, of course, we cannot ignore it" (Helpling Manager).

This statement underscores how reputation is framed as a core asset of the platform, and how the platform's reputation is fundamentally contingent on the individual reputation of workers.

3.3. Working conditions within marketplace platforms

As we have repeatedly noted, marketplace platforms portray themselves as mere intermediaries between labour supply and demand, neglecting any direct responsibility for the employment relationship between clients and caregivers. Within this platform model, workers are formally classified as self-employed, and platforms do not provide direct assistance with the formalisation of the employment relationship – neither free of charge nor as an additional paid service. However, the increased visibility of workers' profiles on digital platforms is sometimes mistaken for genuine formalisation of the employment relationship. The case study of Helpling Italy, for instance, revealed that clients often demonstrate limited awareness of workers' employment status, usually assuming that they are formally employed by the platform. As a result, the platform frequently ends up mediating irregular forms of employment.

In this respect, *French Case 1* is relatively different. The platform operates as a typical marketplace, yet it exhibits a relatively higher sensitivity to the vulnerabilities of the domestic work sector and directs its efforts towards raising people awareness regarding employment rights and exploitative practices that are commonly found in these sectors. The platform provides paid training programs to both workers and employers, with the main goal of promoting the correct use of the *CESU* – an employment service voucher introduced in 2005 in France, which provides a regulatory framework to grant social protections for care

workers. Training is presented as a central component of the platform's identity: the founder explicitly frames French Case 1 as a "training organisation", and the website describes it as "the first community of home care workers who use the CESU". In this regard, the platform business model merges a conventional intermediation approach with a strategy aimed at fostering user awareness through the offer of training initiatives.
In any case, as for Helpling and Care.com, the formalization of the employment relationship is effectively delegated to the clients. As far as clients choose not to formalize the employment arrangement, the platform ends up intermediating informal work.

3.3.1. Flexible pricing systems

Consistent with the idea of digital marketplace as a mere intermediary between labour supply and demand, the six platforms here analysed leave workers and clients free to define the price of the service provided/required. In the case of Helpling Italy, the platform initially adopted a fixed pricing policy – €10.50 for recurring services and €12.50 for one-off services – shifting to a flexible pricing model since 2017. What the platform continues to do, as explained by the manager interviewed in the context of the Italian case study (Pais and Bonifacio, 2025), is to suggest a recommended price, which is calculated based on the average market cost for similar services. Interestingly, this calculation takes the informal labour market as a benchmark, which is a further evidence of how this platform model tends to remain embedded within existing market conditions rather than actively reshaping them. In a similar vein, the analysis of Care.com Denmark reveals that, in several cases, workers tend to accept lower rates compared to what they would normally charge outside. This illustrates that, even in a context characterised by strong labour market regulation, such as the Danish one, digital platforms may create the conditions for the emergence of a low-cost labour supply. Interestingly, Care.com Spain workers interviewed reported that the price suggested by the platform (€9) is aligned with the statutory minimum wage for domestic work (€9.26) and therefore it is commonly taken as a reference point when defining the price requested for their own services (Molina and Casanova, 2025). What clearly emerges from the comparative analysis of these platforms, is that the absence of a uniform pricing mechanism lead to a relative internal stratification. The prices set by workers may vary significantly according to a range of factors, including professional experience, training credentials, and local market conditions. According to the French Case 1 manager, workers rely on a variety of criteria to determine their service rates, including elements related to their professional status – such as prior experience in care work or training credentials – as well as market-related factors, such as local income levels (Poblete et al. 2025). In more general terms, the relationship between the negotiated prices for service provision and the existence of statutory minimum wages deserves further investigation, as it may significantly affect both the valuation of care work and the distribution of bargaining power between clients and workers.

3.3.2. Booking tools and payment conditions

While algorithmic visibility and reputational systems can operate as mechanisms of labour control – inducing workers to conform to platform-defined norms and client expectations – the integration of technological tools for service booking and payment management within digital platforms provides workers with a slightly higher degree of protection compared to informal domestic work arrangements. Platforms like Helpling and Care.com automate payment transfers, ensuring that funds are credited directly to workers' bank accounts on a regular basis. In this way, they eliminate the need for workers to negotiate payments directly with clients, a dynamic often marked by discomfort or vulnerability. The digital payment system enables Helpling also to give a relative support in recovering unpaid fees, which is probably due to its business model of retaining a percentage of each transaction.

Similarly, in French Case 1, the introduction of a digital "pointing device" allows workers to request compensation for extra hours. While this feature is declarative rather than automated – and, therefore, relies on clients' approval and may potentially lead to abuses – it addresses the widespread issue in the domestic sector concerning unpaid labour. Through these technological tools, platforms introduce a relative degree of standardization in the payment modalities through a mechanism of traceability of economic transactions. In this way, as argued in the French Case 1 report (Poblete et al., 2025), the technological infrastructure provides a subtle mechanism of worker protection within an organizational model that would otherwise lack binding employer obligations.

On the other hand, it must be emphasized that – as any technological artifact – these tools become effective instruments of protection as they are actively used. For instance, rising platforms' costs may encourage users' disintermediation. In the case of Helpling Italy, some workers interviewed have reported that the increase of transaction fees has led many of them to continue their employment relationship outside the platform after the first encounter. This, in turn, has the potential to compromise the long-term viability of the platform business model and diminish the indirect labour protection afforded by these tools – a factor that assumes particular significance in markets characterised by high levels of informality, such as the Italian one.

3.3.3. Social protections and conflict resolution

One of the most critical consequences of the marketplace model, as previously noted, lies in the significant gaps which it creates in terms of workers' social protection. Since cleaners and carers are classified as independent contractors, they are individually responsible for ensuring their own salary and social security. This had particularly severe consequences during the Covid-19 emergency. In Italy, as reported in the Helpling Italy report, when platform workers saw their income suddenly suspended and, lacking a formal employment contract, were often not eligible for public support measures or emergency subsidies. In relation to social protections, marketplace platforms do not provide access to labour rights – such as formal employment contracts, paid leave, sick leave, injury compensation, or maternity benefits. Where insurance coverage is provided, as in the case of Helpling Italy, it protects any damages caused by workers and thus seems to be designed primarily to protect clients, while leaving workers uncovered in cases of illness or injury.

A further area of concern relates to the respect of the working conditions agreed by the parties. As previously discussed, interventions by platforms like Helpling and French Case 1 in cases of unpaid work may offer a minimal guarantee in terms of remuneration. However, preventing client-related abuses – particularly regarding the respect of the agreed work hours and tasks – remains more challenging. In this regard, again, French Case 1 seems to be perceived by the workers interviewed as a relatively virtuous example of a marketplace platform. Workers report feeling able to contact the support team for advice in the event of conflict with clients, although no formal or institutionalised conflict resolution mechanisms are in place. Notably, the information made available through the app itself seem to play an important role in mediating such disputes. Workers seem to take these platform guidelines as a reference to clarify the boundaries of their responsibilities, when disagreements with clients arise concerning the tasks to be performed. This, too, however, constitutes a form of indirect and "soft intervention," as defined in the research report on the French Case 1 (Poblete et al., 2025).

3.4. Workers' composition and social trajectories

The engagement of platform workers with marketplace platforms seems to be part of a broader strategy to re-enter the labour market following career interruptions or structural exclusion from formal employment. Across all contexts, the appeal of platforms lies in their flexibility and accessibility. This finding is consistent across all the cases analysed. A recurring pattern, particularly for women and migrant workers, is that platform work constitutes a "second career".

Also in this regard, marketplace platforms seem to embed and reflect the structure of each national labour market. In the case of French Case 1, the workforce is composed almost exclusively of French women over the age of 40 with prior formal employment experience, often in care-related or adjacent sectors. Their transition to platform work is described as a deliberate choice, motivated by the pursuit of improved working conditions and higher-quality care settings, in contrast to the stressful and depersonalizing experiences often encountered in residential care. In this context, digital platforms are framed as a valid alternative to proxy agencies or informal job-seeking networks, do to their capacity of enhancing workers' visibility and facilitates the match with potential clients.

By contrast, both Helpling and Care.com register a higher concentration of migrant workers. In Ireland, Helpling's workforce is predominantly composed of migrants: younger Brazilian students engaging in temporary, part-time work while studying, and older African migrants who use the platform to supplement income alongside other jobs or caregiving responsibilities. In Italy, experienced migrant workers coexist with native Italian workers, who are typically adults marginalized from the formal labor market or affected by economic decline due to personal circumstances. However, it should be noted that the proportion of Italian workers on the platform appears to be higher than that observed in the informal labor market. For these people, the open structure and visibility granted by digital platforms are the opportunity to re-enter the labour market, even if only temporarily, to address immediate financial needs. Similarly, in the Danish context, Care.com primarily attracts women – especially migrants – who face barriers to formal employment due to immigration status, family obligations, or the non-recognition of foreign qualifications. However, even within migrant labour forces, significant heterogeneity emerges. The platform accommodates a range of worker profiles: from highly skilled caregivers with professional experience who struggle to access regulated care professions, to younger, less experienced migrants without formal training, and students seeking income and practical experience alongside their education. Additionally, some long-term care professionals – social and health care helpers and social and help care assistants – approach platform work either as a secondary income source in addition to their regular job in the public sector.

The evident fragmentation within the workforce of each platform hinders the development of a strong professional identity. Marketplace platforms, on the other hand, offer limited tools for fostering a sense of professional community among workers – for instance, some Helpling Italy workers criticizes the absence of communication channels or opportunities for peer exchange (Pais and Bonifacio, 2025). As has been repeatedly observed in the literature on platform work, the marketplace model encourages workers to present themselves in a professional way, emphasizing prior experience and skills, and taking care of the aesthetic dimension of their profiles to attract clients. This emphasis on visibility, however, does not translate into genuine professionalisation pathways, while it reinforces workforce segmentation and reproduces existing hierarchies, ultimately impeding the collective recognition and consolidation of care and cleaning as skilled forms of work. Once again, French Case 1 stands out in this regard, as training constitutes a central element of both its organisational culture and business model. However, it remains less clear the extent to which this model shapes workers' subjective identification, or whether it may contribute to the development of potential career paths.

4. The Digital Agency model

The digital agency model stands in stark contrast to the marketplace model discussed in the previous section. While marketplaces neglect any form of responsibility, merely acting as algorithmic-based intermediaries between labour demand and supply, the digital agency model is characterized by a higher degree of organizational centralization. Particularly, what distinguishes digital agencies is a more direct involvement in the processes of human resource management – selection, vetting, matching, evaluation. For instance, digital agencies take directly care of clients' request, selecting the worker that they deem most aligned to satisfy their needs. Moreover, they are directly or indirectly involved in the regularization of the employment relation between workers and clients.

In other terms, as we will explore in the following sections, the higher degree of centralization of organizational processes is associated with an increased accountability towards users. On the workers' side, the (direct or indirect) formalization of labour relations results in improved working conditions and a higher level of social protections. On the clients' side, the centralized management of the matching process serves as key mechanisms of trust-building.

The platforms examined in this study are five: Baze (Italy, caregiving and cleaning services), Cuideo (Spain, caregiving services), Homework (Netherlands, cleaning services), Hups (Netherlands, caregiving and cleaning services), and Senniors (Spain, caregiving services).

4.1. The platforms' background

The background of the five digital agencies analysed reveals several commonalities. First, their operations remain largely embedded at the national or subnational level. With the exception of Cuideo—which made a tentative attempt to expand into the French market, an initiative that appears to have quickly failed and is unlikely to resume in the near future—these digital agencies essentially operate within national boundaries. The localized orientation of digital agencies is not framed as a limit by the management. Rather, it reflects a deliberate positioning consistent with the centralized organizational model mentioned above. Interestingly, this nationally bounded scope persists although some of these platforms have attracted financial and Spanish venture capital investment. Cuideo, for example, has raised multiple rounds of funding, including €1.6 million in 2020 and a €5 million round in 2022. The French Case 2 secured capital investment in 2018, enabling both technological and geographical expansion. Despite such injections of capital, however, these platforms seem to have opted for a more capillary national penetration rather than international scaling. This stands in marked contrast to marketplace platforms, where venture capital has typically incentivized aggressive internationalization strategies.

On the other hand, with the exception of the Italian platform Baze, digital agencies generally maintain a more widespread presence at the national level, operating not only in large urban centres but also in smaller and medium-sized locations. This territorial capillarity is made possible by two organizational features that, again, distinguish this model from marketplace platforms.

First, digital agencies tend to maintain physical offices, which serve as essential nodes for building trust and providing direct support to both clients and workers. Cuideo, for instance, began operations in Barcelona and progressively expanded to major Spanish cities, with the goal of managing 20 physical branches by 2025. In the French case, the platform's network grew to over 120 local agencies by 2023 – not simply as a result of growth ambitions, but as a response to regulatory obligations embedded in the "mandataire" legal framework, which requires physical branches. In the Netherlands, both HomeWorks and Hups operate through a combination of digital interfaces and offline offices, enabling face-to-face assistance and guidance.

Second, the digital agency model rests on a more complex internal organizational structure. Unlike marketplace platforms, which typically depend on decentralized, algorithm-driven coordination with minimal human oversight, digital agencies have more robust managerial structures which handle administrative support, workers' vetting and an overall supervising over organizational processes. HomeWorks, for example, employs dedicated coordinators who offer personalized assistance to clients and workers alike, thereby ensuring consistent service quality and relational continuity. The French Case 2, following an influx of external capital in 2018, significantly expanded its in-house IT and operational teams, arriving to employ over 40 technology professionals along with an expanding administrative staff. Cuideo has followed a similar trajectory, scaling up both its digital infrastructure and managerial capacities through repeated rounds of venture capital financing.

4.2. The digital agencies' operational model

The digital agencies examined operate under different business models, centred on service fees and subscriptions charged to clients. Cuideo's model involves an upfront payment by families complemented by recurring administrative fees. HomeWorks adopts a transaction-fee business model, retaining a commission fee on top of clients' rates. Hups and Baze, instead, apply a subscription fee model. Hups charges clients a one-time service fee of €24.95 upon hiring a worker through the platform. Baze employs dual revenue sources, combining an initial subscription fee, scaled between €250 and €400 based on the number of weekly hours requested, with an optional monthly subscription that grants access to additional administrative services including worker regularization, payroll management, and substitution in case of worker absence. According to the interviewed manager, the platform is gradually undergoing a transition toward a transaction-fee-based business model, through the introduction of an internal payment system.

From an organizational point of view, the distinctiveness of this platform model lies in the peculiar relationship between managerial structure and technological infrastructure. While in the marketplace model the technological infrastructure is regarded as a sort of surrogate for the managerial structure, digital agencies are grounded in a bounded automation approach, where technologies are meant to support managerial decision-making rather than replace it.

4.2.1. A direct oversight over workers' selection: the platform as a grant of service quality

A key distinguishing feature of the digital agency hybrid organizational model concerns the process of workers' selection. Unlike marketplace, digital agencies implement rigorous vetting procedures aimed primarily at assessing the applicants' professional background and optimizing the job matching. While marketplaces encourage workers to create highly detailed profiles to attract as many clients as possible, digital agencies actively verify workers' profiles and experience, combining algorithmic screening with human oversight.

For instance, the French Case 2 does not only vets workers before recommending them to clients but also conducts home visits to assess the latter needs and to establish personalized care plans. Similarly, Cuideo adopts a selective registration process requiring CV submission and video interviews. While formal qualifications are taken into account, the platform places greater emphasis on demonstrable experience and references, acknowledging that practical and interpersonal skills are often more indicative of caregiver quality than official certifications.

The CEO of Baze, in turn, sees workers' recruitment as a core organizational function. The selection process involves a comprehensive online questionnaire covering sociodemographic data, professional history, and behavioural aptitudes. This automated screening filters out unsuitable applicants, after which human recruiters conduct interviews and finalize a shortlist of candidates to be presented to clients. Notably, Baze's rigorous recruitment procedure is perceived and framed also by some interviewed workers as the key marker of a high-quality service provider – and, in turn, as a potential vehicle of professionalization.

More broadly, such centralized control over workers' access serves as a tool of strategic positioning for digital agencies, which enhance the platforms' image as a provider of professional services. This internal emphasis on quality assurance stands in sharp contrast to the marketplace model, where clients' trust towards workers is essentially mediated by algorithms and reputation systems.

4.2.2. Crowdsourced reputational systems in a minor key

A main consequence of the greater centralization of this organizational model is that reputation systems play a comparatively marginal role. In digital agencies, the presence of strong human managerial oversight in both recruitment and job matching processes significantly reduces reliance on clients' feedback as trust-mediators.

Among the platforms analysed, Baze, Cuideo, Hups, and the French agency 2 maintain some form of reputational system, whereas HomeWorks appears to operate without one. On Baze, client ratings are integrated into worker profiles alongside references and personal data. However, since the matching process is centrally managed by the platform, reputational data primarily serves as a validation tool in the hands of clients, rather than as a key determinant of workers' visibility.

In other cases, such as the French Case 2, client feedback is visible only to local managers, who employ it to monitor service quality and, when necessary, initiate "quality visits" to clients' homes for further assessment. This model deliberately avoids public or automated reputation scores, instead favouring managerial discretion and contextual interpretation to address potential concerns and uphold standards.

The platforms that assign relatively greater weight to client feedback are Cuideo and Hups. In Cuideo, ratings are publicly visible and can significantly affect caregivers' future job opportunities. Workers report feeling under reputational pressure, as even minor negative evaluations may restrict access to further work. Hups also features a public star-rating and review system, but includes human moderation to remove inappropriate contents. However, reputational feedback appears to play a less decisive role in job allocation. Clients and workers are encouraged to resolve disputes directly, with the platform intervening as a mediator only when necessary.

4.2.3. A hybrid matching process: combining algorithmic profiling with managerial oversight

The bounded automation approach of digital agencies is particularly evident when considering the management of matching process. For instance, Cuideo places strong emphasis on its "Affinity algorithm," which preselects caregivers based on compatibility with client preferences, prior ratings, and experience. However, this is followed by structured human intervention: HR managers review CVs, conduct interviews with workers, and make the final decision. The algorithm thus functions as a filtering tool, but the organizational process remains firmly rooted in human oversight. Interestingly, this is regarded by the platform as a key driver of client satisfaction and, therefore, as a competitive advantage compared to other platforms in this field. This is particularly clear from the following statement from an interview with the manager of the Baze platform, who firmly distinguishes Baze's model from that of a traditional marketplace:

> *"We are not a marketplace; we are trying to innovate the traditional agency business model. In other words, we are an agency with an automated recruiting process. When a family comes to us, they do not browse worker profiles; instead, they explain their needs, and we present them only those candidates who are both a suitable match and available. This is what is usually lacking in digital platforms: they do not provide immediate information on whether workers are available for a specific job offer" (Baze manager).*

Baze employs a three-step process which starts with an algorithmic scoring of the workers included in the database, followed by an AI-driven pre-screening to verify their availability and suitability with the job proposal. The final stage is managed by human recruiters, who interview shortlisted candidates and select three of them to present to the client, who then makes the ultimate choice. Even in the French case, a similar logic is observed. Here, the

algorithm identifies the best match based on proximity and availability, but the final decision is mediated by the local manager. Interestingly, workers interviewed indicates the relationship with them as a driver of job satisfaction compared to other work contexts in this sector.
As previously observed in relation to both worker selection and the use of reputational systems, the hybrid approach adopted by digital agencies in managing the matching process is framed as an important trust-building device, which is highly valued due to the intimate and often vulnerable nature of in-home care work.

4.3. Working conditions within digital agencies

4.3.1. The platforms' role in formalizing employment arrangements

Digital agencies exhibit a clear orientation toward improving working conditions and reducing undeclared work. With the exception of Cuideo, these platforms do not act as direct employers, but provide assistance in formalising the work relationships between the client (employer) and the cleaner or caregiver (employee). The French case exemplifies this trajectory particularly well. Operating under the legal framework of the "*mandataire* model" – a regulatory instrument established in France the early 1990s – the platform enables clients to formally employ care workers while assuming responsibility for all related administrative procedures, as a proxy agency. Similarly, the Dutch platform Hups positions itself as the only actor nationwide offering domestic workers access to multiple legally compliant employment arrangements, including the "*Regeling Dienstverlening aan Huis* (RDAH)", which allows private individuals to hire household workers under a simplified legal regime.
The Spanish case Cuideo is peculiar, as the platform operates through two distinct contractual models. In the first, *Cuideo Selección*, caregivers are selected by the platform but are formally employed by the family; Cuideo manages administrative procedures and ensures compliance with the domestic workers' social security regime. In contrast, *Felizvita* – a provider acquired by Cuideo in 2022 – directly employs caregivers, particularly for publicly funded services in Madrid and Barcelona, aimed at users with lower-intensity needs. Although the two models offer differing levels of social protection – definitely higher in the case of Felizvita – both illustrate Cuideo's greater accountability towards clients and workers.
In general terms, the indirect involvement of digital agencies in regulating the employment relationship provides workers with relatively stronger guarantees that their employment will be formalized, often relying on nationally active regulatory instruments such as the RDAH in the Netherlands and the mandataire model in France. Managers of Hups (Netherlands) and Baze (Italy), interviewed as part of this study, explicitly stated that their objective, through these indirect regulatory mechanisms, is to counter the widespread informal economy that characterizes the domestic work sector. However, as highlighted in the Hups case report (Been and Hesselink, 2025), digital agencies typically remain positioned as facilitators of

labour relations rather than direct employers. This results in a persistent degree of uncertainty concerning workers' employment status, as the legal responsibility for the employment relationship continues to rest with the clients.

4.3.2. Reconciling workers' autonomy and labour regulation

Contrary to a common argument in the platform labour debate which frames labour regulation and autonomy as mutually exclusive, in the digital agencies here examined, the formalisation of employment relationships does not entail a loss of flexibility for workers. On the contrary, digital agencies show that higher degrees of social protection and contractual regularisation coexist with flexible work arrangements.

Technology plays a crucial role in enabling this balance. In the French proxy agency, algorithmic systems are used to optimise matching based on a variety of criteria – including workers' preferred schedules and geographic constraints – while local managers retain discretion to negotiate job offers. Workers are only contacted for job requests that fall within their indicated availability, contributing to reduce scheduling instability typical of hourly domestic work – particularly cleaning work. Similarly, algorithmic matching helps to cluster jobs by location, reducing commuting time for workers. A similar pattern emerges in Baze, where workers retain the ability to accept or decline job offers based on their own preferences – e.g. the nature of the tasks, compensation, or workload.

Platforms like Hups and HomeWorks also offer considerable scheduling flexibility, as work hours and responsibilities are typically negotiated directly with clients. Also, platforms provide a minimal but valued support structure – such as help with conflict resolution or substituting workers in case of illness – reducing risks traditionally related to this work, without neglecting workers' autonomy.

4.3.3. Payment conditions

Better working conditions seem to extend to payment terms and modalities, although some persistent challenges typical of informal labour arrangements remain. Regarding wage-setting autonomy, Hups represents the operational model most closely aligned with digital marketplace practices. The platform grants workers the ability to set their own hourly rates while encouraging compliance with minimum wage legislation. Final wages can be negotiated directly with clients, with platform staff providing guidance to help workers align their expectations with prevailing market norms.

The Cuideo case, however, reveals more critical unintended consequences. Although workers generally receive the statutory minimum wage, several interviewees reported ongoing difficulties in securing wage adjustments following legal increases. Under the Cuideo Selección model – where clients act as direct employers – workers themselves must negotiate pay updates and often face resistance from clients. Such dynamics highlight the limits of platform-facilitated formalisation when the employer-employee relationship remains decentralized and informal practices continue. Additional issues, such as irregular scheduling and unpaid overtime, further complicate fair compensation, illustrating that formal contracts alone do not guarantee equitable pay without effective enforcement and supportive technological or managerial frameworks.

In this context, platform technologies seem to play a pivotal role in actually improving working conditions. The in-app payment management set by Baze exemplifies this process and significantly strengthens worker protections. By managing payments directly on the platform, Baze can monitor and ensure workers' compensation. Furthermore, this technological mediation enables the formalisation of trial periods, which usually tends to be paid off the books. Through the app, trial work can be contractually recognised and paid, reducing legal and financial risks for workers. Interestingly, the manager interviewed also noted that this new model could even serve as a lock-in mechanism, helping to retain users on the platform and prevent their disintermediation after the first encounter.

4.4. Workforce composition

Similar to marketplace platforms, the workforce composition of digital agencies reveals heterogeneous biographical trajectories and reflects varying degrees of motivation and professional backgrounds. Platforms seem to attract both workers with intermittent or precarious labour histories and those possessing – or aiming to construct – a more stable career in caregiving and cleaning services.

For instance, the Dutch platform Hups stands out for its notably diverse pool of workers, ranging from young adults to seniors and including a mix of nationalities. Many Hups workers present detailed profiles highlighting substantial experience and clear motivations, exemplified by the case of a 70-year-old Dutch worker who values platform work both as supplemental income and as a means of staying active in later age. HomeWorks presents a smaller workforce but reflects similar patterns. The career path of one interviewed worker illustrates a return to caregiving work after a period of factory work, exemplifying how platforms can serve as entry or re-entry points in the labour markets.

In contrast, Cuideo's workforce predominantly consists of migrant women, primarily from Latin America, often aged between 40 and 55. Their career trajectories typically involve previous experiences of informal or precarious employment in this sector which often result in the lack formal care certifications. Also in the case of Baze, the workforce appears largely composed of experienced domestic workers, many of whom are migrants – primarily from the Philippines and Sri Lanka. Compared to Cuideo, however, the interviewed workers demonstrate formal employment histories. In this vein, they appear to recognize the platform's value as a facilitator in securing formal contracts that would otherwise be difficult to obtain, as well as in expanding their social capital beyond existing networks.

Lastly, in the French context, care workers tend to be older women embarking on a "second career" after interruptions related to maternity, unemployment, or precarious labour experiences. For those with prior experience in the care sector, platform work is attractive primarily due to their dissatisfaction with institutional care settings and a desire for greater autonomy afforded by digital platforms.

Overall, the platforms' appeal to this diversity of workers, in terms of age, geographical origin, and professional experience, can be primarily interpreted as a sign of the complexities of these labour markets and their structural precarious conditions.

5. Regulated Marketplace

Hilfr (Denmark) and Home Care Direct (Ireland) are two prominent examples of a distinctive model of digital labour platform operating in the field of domestic and care work, which we refer to as a regulated marketplace. These platforms operate as marketplaces, as they merely provide the infrastructure for supply and demand to connect, without directly managing the matching process between workers and clients. However, different than platforms such as Helpling or Care.com, they intervene, either directly or indirectly, in regulating the employment relationship between workers and clients. Although the two platforms operate in different sectors – Hilfr intermediates domestic cleaning services, whereas Home Care Direct provides caregiving services – they share important similarities in their development and normative orientation.

5.1. The platforms' background

First, unlike multinational players in the platform economy, and similar to digital agencies, both platforms operate exclusively at the national level, albeit with different degrees of territorial reach – Hilfr concentrates its services in the urban centres of Copenhagen and Aarhus, whereas Home Care Direct also operates in smaller and remote areas. Home Care Direct was founded in 2018 in Ireland, emerging from a traditional Irish-owned care agency, Home Care Plus. Hilfr was launched in 2017 by a group of Danish entrepreneurs. Unlike conventional marketplaces such as Care.com or Helpling, which limit their role to facilitating service exchanges while neglecting any responsibility towards users, regulated marketplaces enter the domestic care market with a declared aim of improving and safeguarding labour conditions. For instance Home Care Direct has positioned itself as a vocal participant in Irish policy debates on home care, advocating for more transparent and prescriptive public funding models to ensure carers receive fair pay. Similarly, Hilfr was founded not only to address a market inefficiency in connecting clients' demand with domestic cleaners, but also to actively promote better working conditions for the latter. In Hilfr's case, this ethical commitment has been institutionalised through the negotiation of a collective agreement with the Danish trade union 3F, which will be the subject of a more in-depth analysis in the context of Work Package 4. As stated on the platform's website: "Hilfr is the first cleaning platform in Europe to have negotiated a collective agreement with a trade union (3F).

5.2. The Regulated Marketplace operational model

As previously noted, both Home Care Direct and Hilfr organizational structure formally resembles that of online marketplaces. They enable the encounter of demand and supply of domestic care and cleaning services without directly manage the matching process, and retain a commission fee on each economic transaction. In the Hilfr website, this is advertised as "the lowest fee in the market – only 6 percent". In this vein, and again similar to platforms such as Helpling and Care.com, regulated marketplaces have interest in increasing the number of clients and workers to maximise economic transactions. However, the two platforms diverge significantly in how they regulate workers' access. While Hilfr does not actively monitor the registration of workers beyond basic verification, Home Care Direct adopts a more structured and selective recruitment process. All carers must undergo interviews with management, provide references, verify their identity, and complete Garda Vetting, the Irish national background check procedure. This emphasis on formal vetting, rather than post-hoc algorithmic monitoring, reflects a broader ethical positioning: the platform aims to foster client trust through verified expertise rather than user-generated reputation metrics. This orientation is further reinforced by the platform's decision not to implement a crowdsourced reputational system.

5.2.1. Bounded automation: combining algorithmic management and human oversight

Similarly to what we have already observed in relation to the Digital Agency model, regulated marketplace adopts a model of bounded automation, combining algorithmic processes with a quite strong reliance on human oversight on a number of organizational functions.

In both platforms, algorithms are primarily used to optimize clients' search and booking process. Hilfr enables clients to input their preferences (e.g., location, date, time, frequency), and thus generates a list of compatible cleaners. Despite the structural opacity of this algorithmic system, according to the interviewed manager, workers' availability is the most important parameter to determine workers' visibility. Hilfr provides clients with highly detailed worker profiles, including name, photograph, hourly rate, personal bio, languages spoken, and a badge-based classification system. Also, the platform adopts a set of algorithmically assigned labels such as "Super Hilfr," "Top Performer," or "New Hilfr" which echo the "Super Host" badge used by Airbnb. This visibility regime supports clients' informed decision-making but also introduces a stratification logic typical of digital platforms, with workers' success partially depending on how their profiles are curated and ranked, and on the ratings received by other clients.

In the case of Home Care Direct, the algorithmic filtering seems to be essentially grounded on the use of some basic location-based parameters. After entering a postcode, clients see a list of carers nearby, without any algorithmic ranking based on ratings, performance, or activity levels. Profiles show workers' credentials and other vetted indicators of professional expertise, rather than reputational cues. Aligned with the above-mentioned platform's ethical stance, workers are presented in a non-hierarchical manner. This approach is indicative of the management's commitment to localism, based on the assumption that care providers are likely to be attuned to their social and cultural contexts, and that this cultural alignment between clients and carers may result in increased trust. Furthermore, local care is intended to improve environmental sustainability, by enhancing proximity-based care model and reducing the need for carers to cover long distances to reach their customers.

The most important difference between the two platforms in relation to algorithmic management concerns the use of a reputational system. Hilfr adopts a standard reputational system, whereby clients assign synthetic ratings to workers, which are in turn displayed in their profiles and become a key factor in determining cleaners' work opportunities. As acknowledged by the platform's clients, reviews play an important role in choosing which worker to contact, alongside price and personal descriptions. In contrast, as we have already observed, Home Care Direct rejects this logic entirely. The platform does not collect or display user-generated reviews. Rather, it builds trust through formal vetting processes and transparent presentation of qualifications.

5.3. Working conditions within Regulated Marketplaces

As previously discussed, the operational model of regulated marketplace platforms is formally similar to that of traditional marketplaces. Platforms do not directly manage the matching process, but they facilitate the encounter between supply and demand, organizing workers' visibility by means of algorithmic tools. The very innovation of this platform model lies in how it seeks to ensure decent working conditions, while granting complete autonomy to both clients and workers.

5.3.1. A step towards regulating platform domestic work

Both Home Care Direct and Hilfr stress their positioning as platforms that aim to formalise arrangements that have traditionally been characterised by informality. For this reason, each platform centrally deals with a layer of administrative services – e.g. managing payments, tax obligations, and legal compliance – that contributes to the regularisation of domestic work and to relieve caregivers and clients of the administrative burden. Interestingly, they pursue this underlying goal with two different approaches and employment arrangements.

Home Care Direct operates within a self-employment framework. All carers are legally self-employed, but the platform supports them by handling administrative and fiscal responsibilities, thereby making self-employment more viable and less susceptible to abuses or potential exploitation. As highlighted in the Home Care Direct report (Murphy et al., 2025), this model preserves a high degree of flexibility for workers – an aspect highly valued by the interviewed workers – while simultaneously offering families a route out of informal, "cash-in-hand" arrangements. Crucially, the platform does not act as an employer itself; rather, it facilitates the formalisation of care relationships by families, thereby legalising existing care arrangements without altering the carer's self-employment status.

By contrast, Hilfr adopts a more radical approach. The platform has progressively moved toward a formal employment model. Initially designed to connect freelance cleaners with clients, Hilfr implemented a hybrid system following its first agreement with the Danish trade union 3F in 2018, under which workers would automatically acquire employee status after completing 100 hours of work, unless they explicitly opted out. Since 2024, however, the platform has fully transitioned to an employment-based model under a new collective agreement – referred to as Hilfr2 – which mandates that all workers are classified as employees. This shift marks a significant transformation in the regulatory configuration of platform work, representing a paradigmatic example of a more traditional embedding of the company within the institutional frameworks of national labour regulation.

5.3.2. Payment system

Beyond the shared ethical positioning of Hilfr and Home Care Direct, important differences also emerge in their payment structures and remuneration models.

Hilfr adopts an hour-based payment model, where customers book a specific number of hours with a cleaner rather than a fixed task. This arrangement shifts the responsibility of estimating the required time to the client and ensures that workers are paid for the time actually dedicated to work, regardless of task completion. Unlike platforms that tie pay to task size (e.g., square meters), Hilfr's model reduces pressure on workers to rush or undercut their time. Customers pay more than just the hourly wage: additional costs include social expenses, insurance, and a platform fee, making the final customer payment higher, but supporting improved labour protections. The platform follows a collective agreement that establishes a minimum wage of 175 DKK/hour (€23.50). In practice, most cleaners earn over 200 DKK/hour (€ 26,80), reflecting a generally higher compensation level.

On Home Care Direct, similar to marketplaces like Helpling or Care.com, caregivers operate as self-employed professionals and are granted the flexibility to set their own hourly rates. This flexibility supports a relatively informal pricing structure, enabled by direct communication channels between clients and carers. The platform intervenes only at the stage of initial contact, after which all further interactions occur directly between the parties. As highlighted by some workers interviewed, this arrangement enables them to take into consideration additional conditions such as travel time, mileage reimbursement, and, in some cases, even holiday arrangements. Hourly rates are negotiable and may vary based on multiple factors – for example, reduced rates may apply for longer consecutive shifts, while higher fees may be charged when care involves multiple recipients.

Of course, the higher earnings enabled by the flexible payment system are paired by a corresponding uncertainty regarding income continuity, which replicates quite widespread dynamics in the gig economy. As reported in the analysis developed by the Irish research unit (Murphy et al., 2025), workers are clearly aware of the trade-off between flexible, higher-earning opportunities and the weak social protections related to their self-employee status. Moreover, caregivers highlight that the flexibility afforded by the platform model extends beyond greater autonomy in working hours and the ability to negotiate their service rates. Perhaps counterintuitively, it also includes the opportunity to work with the same clients on a repeated basis, hereby allowing them to build closer and more meaningful relationships with care recipients.

5.4. Workers' composition

It is challenging to compare the workforce composition of two platforms operating in different sectors – cleaning and caring – and in distinct national contexts – Denmark and Ireland. However, examining their characteristics allows for a deeper reflection on the interdependencies between a given operational model and the markets where it operates. In turn, this enables a better understanding of how certain working conditions align with – or fall short of – workers' needs and motivations.

Home Care Direct presents a markedly female workforce. However, while many digital care platforms operating in Ireland rely on migrant labor, Home Care Direct reports a significantly higher proportion of Irish workers – approximately 60% of its workforce. This difference may be partially attributed to the platform's operation outside major urban centres, where the concentration of migrant people tends to be lower. In terms of professional background, many HCD workers have previous experience in private care agencies and thus enter the platform with established skills and competencies. The model also attracts individuals who have had prior careers in other fields and are seeking to (re)enter the labour market in a more marginal or flexible capacity. Moreover, according to analyses conducted by the Irish research unit, the platform seems to facilitate the continued employment of older workers who, under conventional employment contracts, might be compelled to retire.

By contrast, Hilfr displays a markedly different workforce profile, shaped by both its sectoral focus (home cleaning) and its specific geographical context. The majority of workers are Argentinian women, a pattern influenced by Denmark's Working Holiday agreements with this country[2]. Hilfr's recruitment networks rely heavily on these migratory pathways. Many workers interviewed had initially arrived in Denmark for travel or study purposes and discovered the platform through informal channels such as WhatsApp and Facebook groups catering to the Argentinian community. Hilfr workers tend to identify themselves as "travellers" rather than long-term residents or professionals seeking stable employment. Few express intentions to remain in Denmark over the long term, and their affiliation with the platform is often transient. This transitory workforce character may also be a primary factor underlying high turnover rates, with individual cleaners leaving after brief periods due to returning to their home countries or relocating elsewhere. Regardless their skills level or prior work experience, Hilfr workers tend to see cleaning as a temporary job and to share a common ambition for building a professional career outside the cleaning sector.

The differing workforce compositions of Hilfr and Home Care Direct also reflect the distinct recruitment regimes adopted by the two platforms. It is reasonable to assume that the more experienced workforce of Home Care Direct stems also from the platform's stricter control over workers' access. Additionally, Home Care Direct implements some community-building and support mechanisms among its workers, fostering mutual acquaintance and helping to mitigate the isolation that is typical of digital labour platforms. In contrast, Hilfr

[2] As reported in the Hilfr report (Bjerre, Ilsøe, 2025), these agreements allow young citizens from these countries to stay in Denmark for up to one year. During their stay, individuals can work for up to six months (Chile) or nine months (Argentina) in nonpermanent jobs. They are also permitted to stay in the Schengen area for up to 180 days, divided into two periods of 90 days each

does not always require prior professional experience for platform entry, resulting in a more diverse and often less specialized workforce. This greater heterogeneity, coupled with the autonomy granted to both clients and workers in managing the matching process, produces internal barriers shaped by customer preferences. For instance, men reportedly encounter greater difficulties in accessing work opportunities, reflecting gendered assumptions held by clients regarding domestic labour.

6. Care vs. Cleaning platforms

As observed in Section 3, contrary to our initial expectations, we did not identify any significant differences between marketplace platforms operating across multiple national contexts, such as Care.com and Helpling. What clearly emerged from the mapping analysis (see Bonifacio and Pais, 2025) and is further reinforced by the case studies is a marked distinction based on the sector of activity. This differentiation highlights that platforms providing care services tend to adopt the Digital Agency model, whereas those offering cleaning services are more frequently positioned within Marketplace or On-Demand models. Specifically, among the 22 digital agencies analysed, 10 are platforms dedicated exclusively to care services (out of a total of 16 platforms for Carers overall), 5 focus on cleaning services, and 7 operate in both sectors. In contrast, within the marketplace model, there is a clear predominance of platforms oriented towards cleaning services (n=13) and platforms offering both care and cleaning (n=15). Only three of the 16 marketplace cases are platforms operating exclusively in the care sector. This trend becomes even more pronounced in the On-Demand model, where no platforms were identified that operate exclusively in the provision of domestic care services.

This distribution reflects differences between the two occupational domains, which primarily concern the nature and temporality of work. Domestic care work is typically characterised by a high degree of emotional and relational intensity, requiring sustained interpersonal engagement, affective labour, and a sense of moral responsibility. Employment relationships in this sector often take the form of long-term, stable arrangements, with caregivers frequently working for a single client over extended periods – sometimes in live-in settings. This enduring relational configuration, coupled with the vulnerability of care recipients, calls for a higher level of mediation and curated matching, thus explaining the greater adherence of care platforms to the digital agency model. Within this model, platforms assume a proactive role in selecting and vetting workers, constructing trust with clients, and managing the risks and uncertainties inherent to care work.

By contrast, domestic cleaning work tends to be more fragmented, time-limited, and transactional. As a result, cleaners typically engage with multiple clients simultaneously, often across different locations and on a short-term basis. These features make cleaning services more compatible with marketplace or on-demand models, where the platform primarily facilitates the encounter between labour supply and demand, but exercises limited control over the labour process, placing more emphasis on users' autonomy.

7. Conclusions

In this report, we have tried to deeply analyse the profiles of three distinct platform models by comparing 14 case studies. The analysis confirms that differences clearly exist between these models.

Digital marketplaces typically operate with minimal direct intervention in the employment relationship, acting primarily as intermediaries that connect workers and clients. This results in limited social protection for workers, who often bear the risks associated with precarious and informal arrangements.

In contrast, digital agencies stand out by adopting an active role in human resource management. This model tends to provide a higher degree of social protection, facilitating access to formal employment conditions. Notably, while in marketplace platforms the technological infrastructure tends to overlap with the managerial structure, digital agencies are distinctly characterized by a bounded automation approach, wherein technology is designed to support rather than replace human oversight.

Regulated marketplaces represent a hybrid organizational model synthesizing elements from both approaches. Like marketplaces, the two platforms analysed do not directly manage the matching process but merely connect labour demand and supply. However, akin to digital agencies, these platforms assume more direct responsibility in the employment relationship, either facilitating the formalization of the relationship between client-as-employer and workers-as-employees (as in the case of Home Care Direct) or acting as the direct employer (as in the case of Hilfr).

Beyond organizational differences and their consequent impact on working conditions, the case studies also reveal some commonalities. Most notably, the workforce composition reflects the structure of each national labour market while also exhibiting significant heterogeneity in terms of geographic origin, professional experience, and sector-specific expertise. Finally, a widespread dynamic observed across the majority of cases is that many workers engaged in platform-mediated domestic and care work possess limited prior experience with unionization and tend to scarcely view trade unions as relevant social actors to address their work-related issues. This general lack of engagement reflects the highly individualized character of platform-mediated domestic work and the marginal role played by collective support mechanisms in this sector, which ultimately further weakens workers' contractual position and bargaining power. On the other hand, it highlights the urgent need for innovative forms of worker representation and social dialogue that more accurately reflect the realities and perceptions of platform workers in this sector. This topic will be the focus of an in-depth analysis within the context of Work Package 4.

8. Commentary by Ursula Huws

The literature on digital platforms providing services directly to end users and their business, contractual, employment, training and insurance models, has until recently been dominated by research that has been carried out in a relatively small number of sectors – in particular those involving personal transportation and the delivery of food, groceries or packages.

Typically, these platforms mainly employ men who work in public spaces and whose skill requirements (at least those for which they are reimbursed) are, in the main, restricted to the ability to drive or ride a vehicle, follow the instructions issued by the apps by which they are managed and communicate minimally with clients. This has led in some cases to what might be regarded as a somewhat skewed and stereotypical view of what digital platforms are and how they typically function. It has also rendered relatively invisible the kinds of service supplied by other kinds of platforms in which the workforce has a different demographic profile and workers may be required to exercise a much broader range of skill sets, develop different kinds of relationships with their clients, often of longer duration, and work in private, rather than public spaces.

This comprehensive analysis by the Origami project of 69 platforms in 6 EU countries involving cleaning and care work takes an important step towards correcting this imbalance. In doing so, it confirms some of the findings of past research on digital platforms but, importantly, challenges others. In particular, it questions the widespread view that platform work typically follows a normative model in which workers are matched with customers by the platforms for which they work, are managed by algorithms, are ranked using customer ratings and have their payments per task determined by the platform.

Using a rigorous methodology, based on examining 22 variables, this study reveals a much more complex, variegated and nuanced picture. Some platforms, especially those providing cleaning services, fall into what the authors name the 'Marketplace' model, which complies in some respects with the common stereotype of the digital platform. However only 31 out of 69 cases were assigned to this category and, even here, some details were notably different from those found in the business model of, say, a typical platform providing food delivery or taxi services. In the majority of these cases, workers' profiles are visible to users, and clients are able to access their reputational scores. However, in most cases workers set their own rates of pay. The role of the platform is thus limited to that of an intermediary, putting clients and workers in touch with each other but avoiding responsibility for many aspects of the relationship, including direct management of the workers.

At the opposite extreme is another relatively large group of platforms (24 out of 69) which are categorised as following a 'Digital agency' model. This group is dominated by platforms delivering care services and the authors suggest plausibly that this professional profile is linked to long-term relationships with clients and a need for trust, driving a business model closer to that of traditional (non-platform) intermediaries, in which platforms take greater responsibility for determining arrangements, including setting price levels. Between these models are hybrid forms. Platforms in the 'On-demand' group (10 out of 69 platforms, typically involving care work) manage the matching process directly but do not handle the contractualisation of workers. On the other hand, a smaller group (4 platforms), designated as following a ‘Regulated marketplace’ model, are distinguished from the general ‘Marketplace’ model by the way they take on the management of the contractualisation of workers.

The Origami project’s careful mapping of platforms in relation to a range of variables goes beyond simply illustrating the heterogeneity of platforms providing cleaning and caring services in the home – although this in itself provides valuable insights. Origami’s conceptual framing also makes it possible to develop typologies that can ensure that future qualitative research covers the full range of business models, enabling sampling that is broadly representative of the range of digital platforms in the field. Furthermore, it allows for the development of clear hypotheses that can be tested in the qualitive case studies that are envisaged in the next stage of this research. More broadly, beyond the scope of this particular project, it provides a framework in which research on other types of digital intermediation can be carried out in the future, including comparisons between platformised work in different sectoral, regional and national contexts.

This mapping exercise, in other words, acts as a lever that opens up access to a range of questions that have yet to be investigated in this hitherto under-researched field, both from the point of view of developing a scientific understanding of the social impacts of platformisation and from the policy perspective. Given the major societal implications of these developments, this gives these questions some urgency.

In the fields of sociology and gender studies, several questions are raised regarding gender, both in relation to providers of these services and their recipients. To what extent do traditional gender norms dictate the division of labour in these services and how they are valued? Are changes taking place in the relative extent to which these types of work are provided by unpaid family labour, provided by the state or provided by the market? And do these patterns vary according to path-dependent norms in national gender contracts (for example the extent to which a breadwinner/housewife model has prevailed in the past)? How are the relationships between care givers and care recipients and their families shaped by gendered power relations? Further questions arise in relation to migration and citizenship status. Are migrant workers more likely to be found working for particular types of platform, and if so which ones? How does this impact their earnings, working conditions and reputational scores relative to other workers? How are they treated by the platforms, for example in terms of recruitment, training, retention or how complaints about xenophobia are dealt with?

The hidden, and often intimate, nature of work that takes place on domestic premises also raises questions in relation to its affective and psycho-social aspects. For example, if issues of abuse (on either side of the relationship) arise, how are these dealt with? Might the fact that carers develop emotional bonds with their clients affect their bargaining power in relation to pay or working hours? Do digital platforms show an awareness of such dynamics, how do they take account of them and how does this vary by type of platform?

The Origami typology also makes it possible to develop hypotheses that will add value to research in the fields of platform studies, industrial relations and comparative social policy, in particular the emerging literature on the changing relationship between the state, and its national and regional institutions, and private companies, in the context of the growth of global digital corporations and a growing dependence by many government institutions on outsourcing services to them.

Perhaps even more important than the research questions that relate to the scientific literature are those that relate to public policy – both at national and European levels. These must be viewed in the context of a range of societal challenges to which digital platforms providing social care and household services seem to offer promising solutions.

One of these challenges is the rising participation of women in the labour market. As progress is made towards gender equality in the workplace, there is an increasing need for domestic services to substitute for the household labour formerly performed without pay, accompanied by a drive to reduce the 'double burden' of paid and unpaid work for individual workers. Platforms providing cleaning and other domestic services offer an attractive solution to these challenges, in principle promising to reduce the burden of housework while also creating jobs in the delivery of these services. However, this development also raises questions about the quality of the new jobs that are being created. How should these workers be trained and their skills certified? How can their health and safety be safeguarded and what kinds of insurance are appropriate? How can systems be put in place that ensure that their working conditions conform to ILO 'decent work' standards? Is there a need for new forms of regulation and, if so, how could these be enforced, given that the work is taking place within private residences, hidden from the public gaze?

Another major challenge is that of the aging population, creating an explosion in demand for social care in most EU Member States. It is clear that the existing landscape of care work is very diverse across Europe, reflecting differing national social, economic and political histories. Nevertheless, there is a growing consensus that this workforce needs to be expanded and developed so that care work can become an attractive career, with attention paid, *inter alia,* to standards, skills (and their certification), professional progression and rewards. Without such a development, there is a risk that the labour supply will be inadequate. While there are clearly many examples of excellent practice on the one hand, it is also possible, on the other hand, that unstable employment combined with a lack of training might lead to low standards of care, putting vulnerable and elderly populations at risk. Much more information about the realities of social care in particular contexts will be needed to enable policy makers to determine whether digital platforms, in their current forms, represent a positive development that can be built on to develop new solutions to improving the matching of skilled care workers with the clients that need their services or whether they might pose new risks of casualisation and relative neglect. In carrying out such research, the Origami model, by enabling the cross-tabulation of a large range of different variables in digital practices, offers an invaluable analytical tool, making it possible to identify which configurations are associated with the best results, both for care workers and their clients.

Finally, the research can benefit policy-makers by exploring the extent to which the practices of digital platforms providing cleaning and care services are nationally specific. This makes it possible to form judgements about whether the best way forward is to pay attention to bringing them into line with national best practices, institutional governance models and regulations (and, where necessary, to tweak these to fit the new circumstances).

It may be, however, that – especially where platforms are international in scope – it is more appropriate to consider European-level interventions. This is likely to be particularly relevant in relation to such issues as skills certification and transferability. However this research also has ramifications for a range of other policy areas including