



ODGERS CONNECT
The Consulting Network



**The Progressive Policy
Think Tank**

The Professional Gig Economy in the UK

An IPPR Briefing Paper for Odgers Connect



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Executive Summary

This briefing analyses the size, nature, and extent of the so-called ‘professional gig economy’ in the UK. We use publicly available data from a variety of sources to give a picture of the extent of professional independent working and self-employment in the UK labour market, finding that it represents a significant portion of the total.

The increasing prominence of professional independent working and self-employment should be seen in relation to the current debate over regulation of the gig economy in the UK. Increasing levels of ‘false self-employment’ associated with insecure work, low levels of pay, and erosions of rights for vulnerable workers have been high on the political agenda in recent months. This led the Government to commission a review into modern working practices in the UK earlier this year. The Taylor Review made a series of recommendations as to how protections for vulnerable workers in the gig economy could be increased.

‘there has not been much research into the size, nature, and extent of professional employment in the UK, or its impact on individuals and organisations using their services’

However, this important goal has to some extent obscured the positive role that independent work and self-employment plays in a modern, flexible labour market, particularly at the professional end. Many professional workers have chosen to take advantage of technological change and changes in the nature of work to become self-employed workers, often incorporating as sole traders, or setting up their own microbusinesses. Survey data suggests that these people are largely satisfied with their decisions, appreciating the independence, the flexibility, and in many cases the increased pay. There is also growing evidence that organisations across both the public and private sector want greater flexibility in their use of skilled professionals, driving increasing demand for independent professional workers.

However, up to this point there has not been much research into the size, nature, and extent of professional employment in the UK, or its impact on individuals and organisations using their services. This briefing paper finds that the professional gig economy represents a sizeable portion of the total so-called gig economy – defined in its broadest sense as all workers employed flexibly on defined, project-specific contracts. Some of our findings include:

‘the professional gig economy represents a sizeable portion of the total so-called gig economy – defined in its broadest sense as all workers employed flexibly on defined, project-specific contracts’

- Our estimate of the number of professional self-employees in the UK, defined as self-employed workers falling under Standard Occupational Classifications (SOC) codes J, K, L and M, is 970,000
 - However, as argued in this paper, Standard Occupational Classification codes have not kept pace with recent changes in the labour market, and are therefore unlikely to capture all occupations that would currently be regarded as ‘professional’. As such, there may be additional professional self-employed workers captured by other SOC codes and therefore not included in our headline figure.
 - Furthermore, because of the incompatibility of labour force data and business population estimates, we are unable to map one onto the other, and are therefore missing out on a wealth of data pertaining to the types of businesses owned by self-employed professionals.
- Almost one third of people working in the professions are now self employed (32%) The occupation with the largest number of self-employment is ‘managers, directors, and senior officials’, with 800,000 people in this sector identifying as self-employed, or 17 per cent self-employed people.

‘With around 33% of the workforce self-employed, the ‘professional, scientific, and technical’ sector has the fourth highest levels of self-employment by industry, however this single classification is misleading and obscures the numbers of professional people working independently’

- Professional occupations have the third highest number of self-employed people, standing at 750,000, or 16 per cent of self-employed people. With around 33% of the workforce self-employed, the ‘professional, scientific, and technical’ sector has the fourth highest levels of self-employment by industry, however this single classification is misleading and obscures the numbers of professional people working independently.
- 42% of the self-employed workforce, or around 200,000 people, earns over £15,570 per annum. Unfortunately, whilst we believe a significant number earn well in excess of this figure, there is little or no official data available above this level.
- There are 3,323,865 businesses registered as ‘sole proprietors’ in the UK, as well as 752,915 registered companies in the UK, 46% of which have no employees. 78% of businesses in ‘professional, scientific, and technical activities’ have no employees, and 76.3% of finance and insurance companies also have no employees, suggesting that many of these businesses are vehicles for professionals working in an independent capacity.

The voices of self-employed and independent professional people, and the organisations that employ their services, have, up to this point, largely been absent from the debate on the gig economy. As a result, there is a danger that policymakers will not account for the interests of either group when considering whether and how to regulate, or the organisations choosing to use their services. This briefing paper seeks to close that gap and ensuring that policymakers are able to make informed decisions about regulation of the professional gig economy.

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‘the combination of technological change and the flexibility of Britain’s labour market are creating the perfect conditions for the emergence of a new class of workers in the ‘professional gig economy’

‘The lack of focus on the working practices of professionals in the gig economy is at least part due to the way in which the Office for National Statistics collects data on the labour market. Many of our labour market statistics have failed to keep pace with the economic changes that have occurred since the financial crisis, meaning that a significant portion of those working in the professional gig economy are invisible’

Introduction

Insecure work is increasingly on the political agenda, as high-profile tech giants such as Uber and Deliveroo find themselves in the spotlight for employing poor working practices. But whilst insecure work for individuals making use of platforms is a critical policy issue, much less attention has been paid to how the transformation of working practices has affected the top-end of the professional labour market.

There is a good deal of evidence to suggest that the combination of technological change and the flexibility of Britain’s labour market are creating the perfect conditions for the emergence of a new class of workers in the ‘professional gig economy’. From independent management consultants, to IT consultants, to legal consultants, many skilled workers have taken advantage of the structural changes currently underway in our economy to work autonomously, independently, and on their own terms.

The lack of focus on the working practices of professionals in the gig economy is at least part due to the way in which the Office for National Statistics collects data on the labour market. Many of our labour market statistics have failed to keep pace with the economic changes that have occurred since the financial crisis, meaning that a significant portion of those working in the professional gig economy are invisible in publicly available data.

In this briefing, we collect and analyse all data on the professional gig economy that is publicly available. This will help us to present a fuller picture of who professional gig economy workers are, the kind of work they are doing, and the sectors in which they are working. It will also allow us to ascertain where there are gaps in the data so that these can be closed over as the professional gig economy continues to grow.

Policy Context

UK labour market

As the IPPR’s Commission on Economic Justice outlines in its Interim Report *Time for Change: A New Vision for the British Economy* (IPPR 2017), the UK labour market has undergone profound changes since the financial crisis. On the one hand, the recovery has created a significant amount of employment – unemployment currently stands at 4.3 per cent, the lowest rate since 1975. Rates of economic activity have decreased alongside this, falling to a record low of 21.4 in the second quarter of 2017.

However, there is still a great deal of slack in the labour market, meaning many people are not working as much as they would like to. Surveys indicate that around 8 per cent of the labour force is underemployed, and would like to work more hours than they currently do. The number of people on a zero-hours contract has also increased since 2007; around 2.8 per cent of people in work are on a zero-hours contract, compared to 0.6 per cent in 2007 – a fivefold increase.

Self-employment has also increased from around 13 per cent of the labour force in 2008 to 15 per cent in 2017. Some of this increase is accounted for by the ‘false self-employment’ found in the gig economy, with new monopolistic platforms like Uber, Deliveroo, and Task Rabbit claiming that they are not obligated to pay the minimum wage or provide protections to their workers because the workers using their platforms are self-employed contractors.

Alongside increasing insecure employment, nominal rates of pay have failed to keep pace with inflation, leading to falls in real wages. In the first quarter of 2017, real wages were 3 per cent lower than they were in 2008. In fact, the UK is currently undergoing the longest stagnation in real wages since the 1860s.

Taylor Review

In light of these trends, the Government recently commissioned Matthew Taylor to undertake a review into modern working practices in the UK (Taylor 2017). The review looked into the 'atypical' working practices that have become more prominent since the financial crisis, including the increased self-employment found in the gig economy.

The review focused on people who work for online platforms like Uber, resulting in a strong focus on gig work at the low end, since very little professional work is sourced in this way. Taylor recommended people finding gig work via online platforms should be classed as 'dependent contractors', with increased rights and protections relative to the self-employed. It also made a series of recommendations designed to ensure that workers would not get 'stuck' on the national living wage.

The Taylor Review did, however, also point out that many people who are self-employed have made a deliberate decision to do so because of the benefits it offers in terms of autonomy, independence, and pay. The Review highlighted that 73% people surveyed said that they were satisfied with their ability to be their own boss. Another survey suggests that 59% independent contractors saw their freelance status as a deliberate choice, and that 92% were moderately or very satisfied with their working lives.

Clearly, there are a large number of people who make an active decision to be self-employed, and who are broadly happy with their decision to do so. However, with increasing focus on 'false self-employment' and insecure work, commentators and policymakers often fail to account for workers in the professional gig economy. As such, a greater understanding is needed of who these workers are, the sectors in which they are working, and the jobs that they are doing in order to inform debate and ensure appropriate policy responses.

‘a significant proportion of those working in the total gig economy work in professional industries and related occupations. Many operate as sole traders, or have their own microbusinesses’

Data Analysis

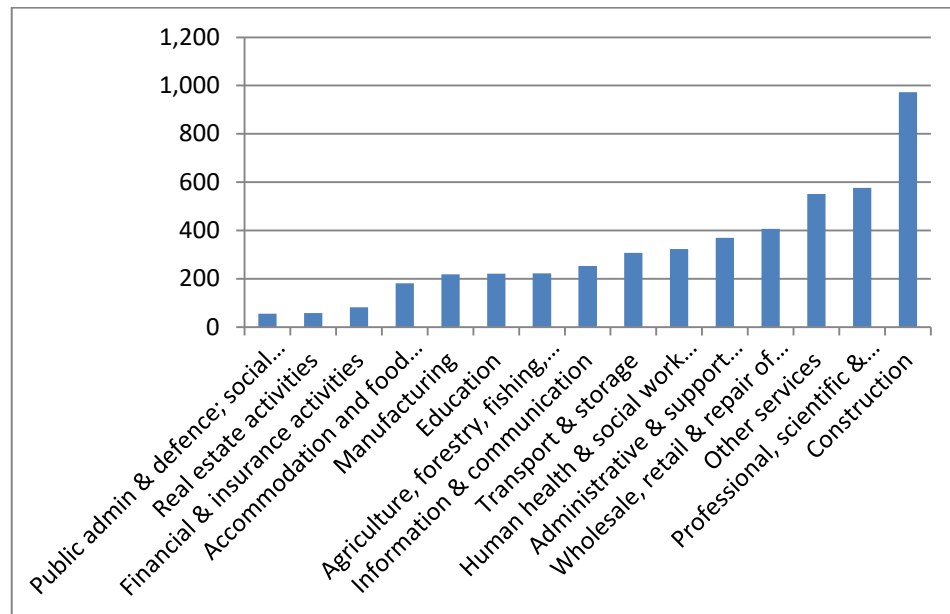
In this section, we present a summary of the data available from the Office for National Statistics and Government on the professional gig economy in the UK, before analysing this data to give a picture of independent professional work and self-employment in the UK. We find that a significant proportion of those working in the total gig economy work in professional industries and related occupations. Many operate as sole traders, or have their own microbusinesses.

Summary of Available Data

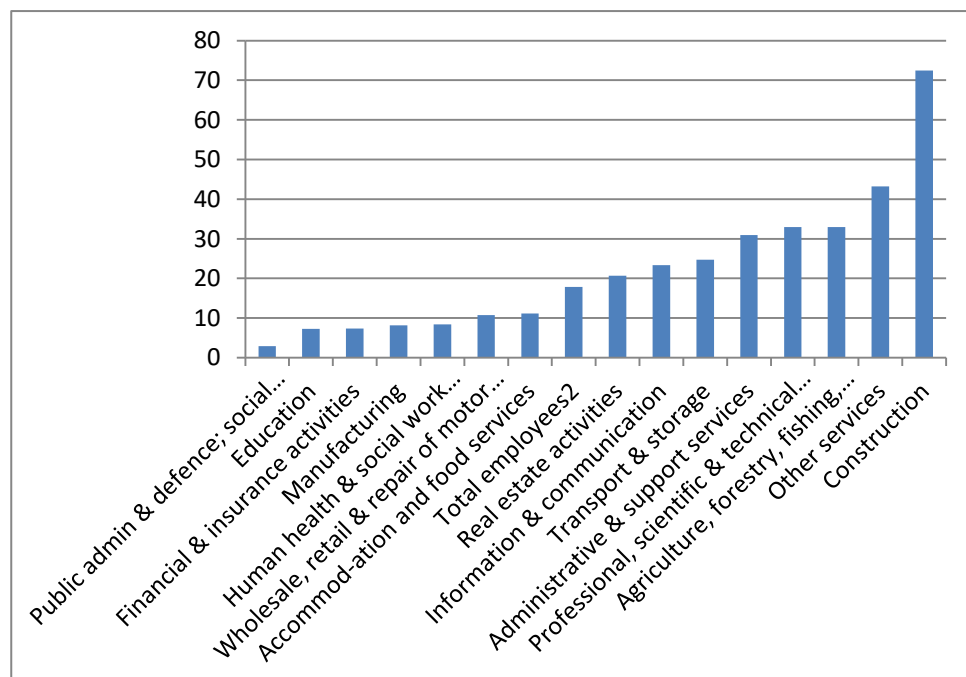
- EMP14: Employees and Self-Employed by Industry – based on the Labour Force Survey – provides data on the total number of employees by industry, and the number of self-employed people by industry using SIC codes.
- JOBS04: Self-employment jobs by industry – based on the Labour Force Survey – provides data on the total number of workforce jobs, and self-employed workforce jobs, by industry using more detailed SIC classifications.
- EMP09: Employees and self-employed by occupation – based on Labour Force Survey – provides data on the total number of self-employed employees in different occupations, using SOC codes.
- The number of individuals and the percentage of the self-employed population, by banded self-employment income, 2015/16, UK – based on ‘Effects of taxes and benefits on household income – shows the number of individuals and the percentage of the self-employed population, in the UK, for 2015/16, with self-employment income that falls into the following bands: Self-employment income (£ per year): Less than 5,965; 5,965 to 15,570; 15,570 and over.
- Business population estimates – provides annual business population estimates for the UK and regions, including break downs by size, industry, and region.

EMP14: Employees and Self-Employed by Industry

Total number of self-employed people by industry (SIC) April-June 2017 in thousands



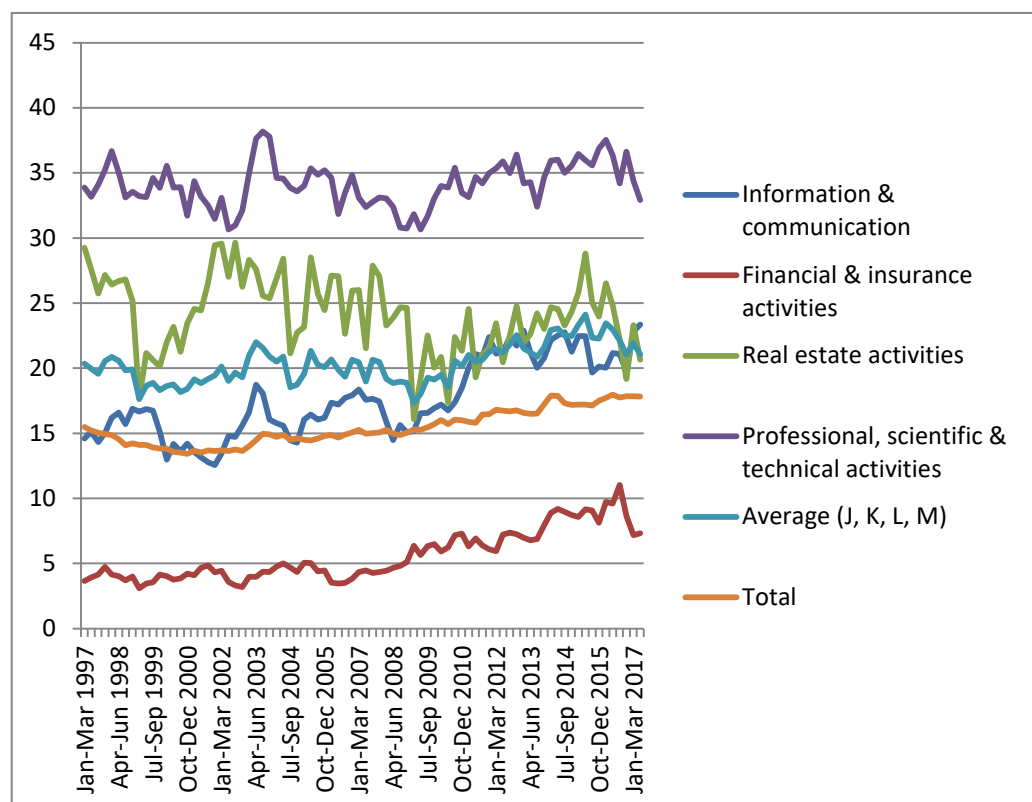
Percentage of sector workforce self-employed by sector April-June 2017



- Construction is the sector with the highest number of people in self-employment, with around 20% of all self-employed people employed in this sector – construction also tops the tables when it comes to the proportion of the workforce that is self-employed, with 72% of the construction workforce self-employed

- Professional, scientific and technical activities come next, with around 12% self-employed people working in this sector, or 33% of the professional, scientific, and technical workforce – the 4th highest by proportion of the workforce in self-employment
 - 'Other services' comes next, with 11 per cent of all self-employed people, and 43% of the 'other services' workforce, working in this sector – the 2nd highest by proportion of the workforce in self-employment
- Public administration, defence, and social security has the lowest number of people in self-employment, with around 1% self-employed people employed in this sector, or 3% of the public administration workforce
- Real estate is second lowest, with 1% self-employed people working in this sector, or 21% of the real estate workforce
 - Finance and insurance is third lowest, with almost 2% self-employed people working in this sector, or 7% the finance and insurance workforce

Percentage of people self-employed in each sector workforce June 1997- June 2017 (SIC J, K, L, M)

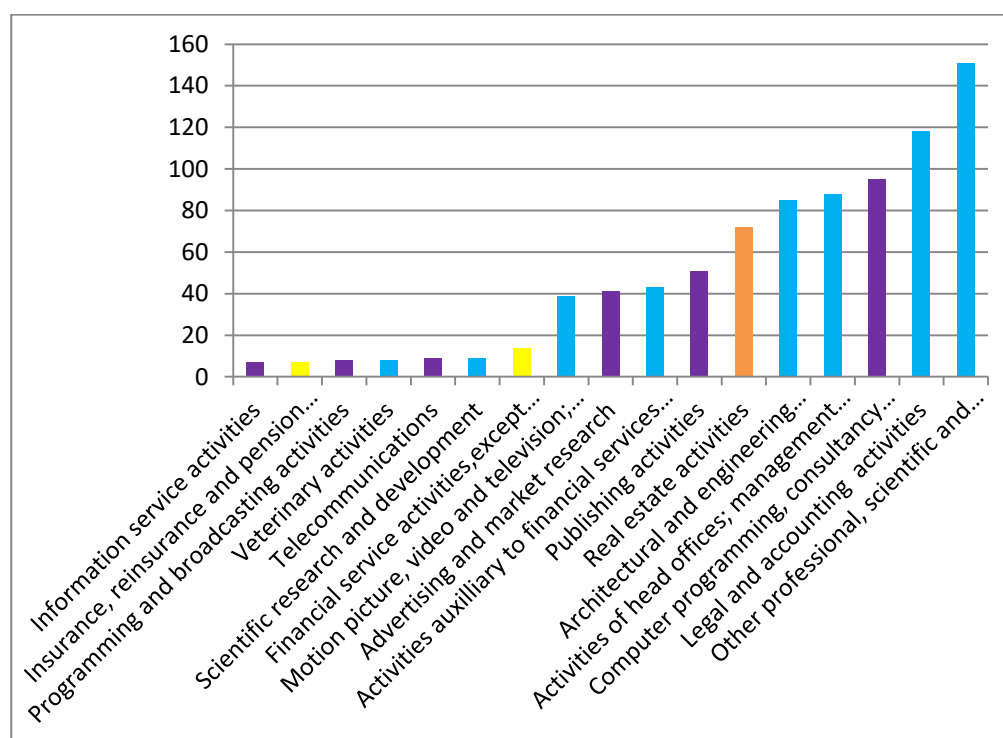


- Over time, the proportions of self-employed people in the workforce has varied substantially by sector. Over the last 20 years, construction has always been the industry with the most self-employed people, but below that figures have changed dramatically:
- Agriculture, forestry, fishing, mining, energy & water used to have the second highest proportion of the workforce in self-employment in June 1997, but this had declined almost 8 percentage points by 2017

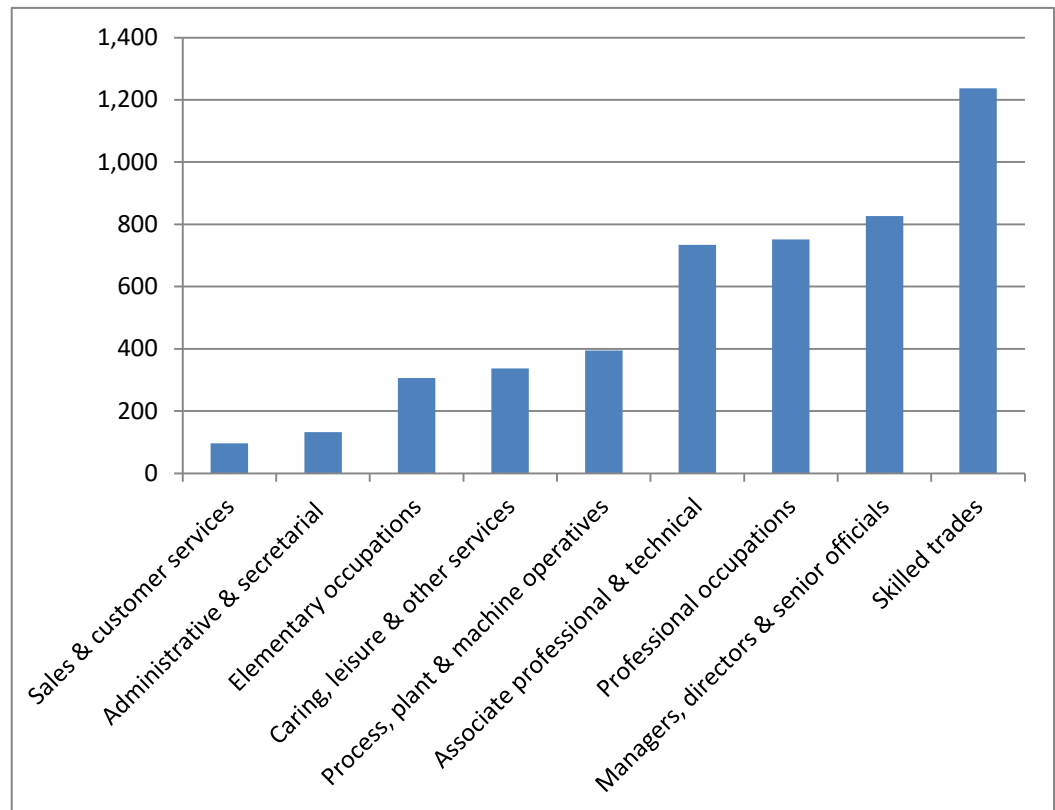
- The proportion of the workforce that is self-employed in the finance and insurance sector has increased by almost 4 percentage points over the last 20 years
- The proportion for Professional, scientific & technical activities has declined almost 1 percentage points
- The proportion for information and communication technologies has increased almost 9 percentage points
- The proportion for real estate has fallen by almost 9 percentage points
- The proportion for 'other services' has increased by almost 7 percentage points
- Whilst the overall proportion of the workforce in self-employment has increased just over 2 percentage points

JOBS04: Self-employment jobs by industry

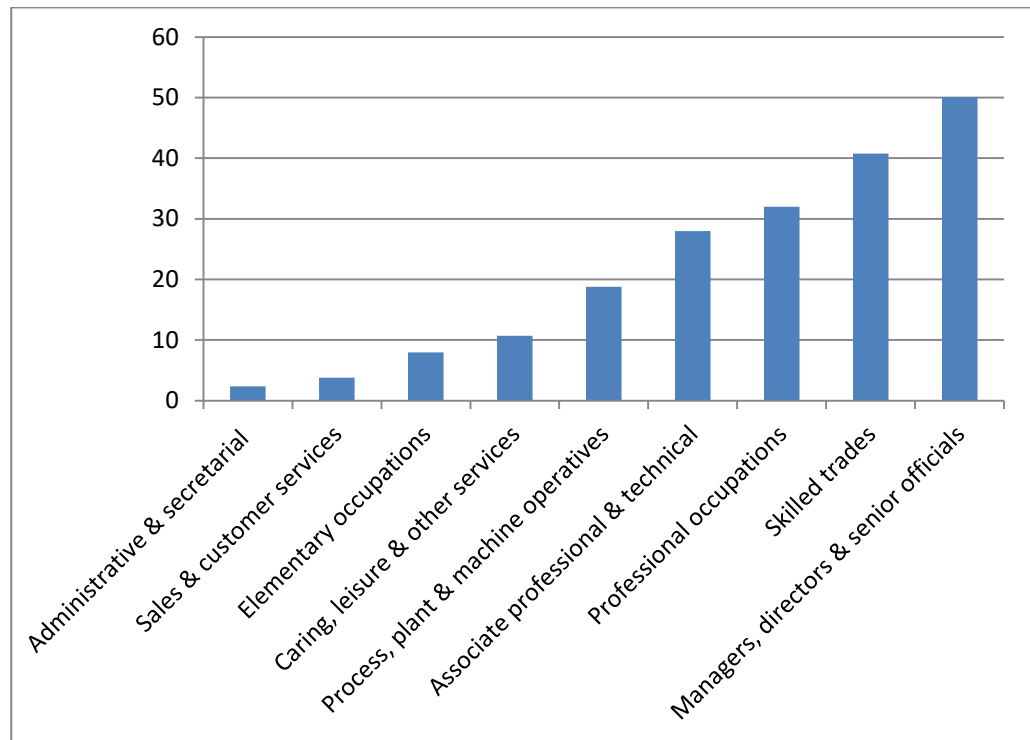
Total number of self-employment workforce jobs for selected industries by Detailed SIC code, for SIC codes J, K, L and M (in thousands)



- The highest number of self-employment workforce jobs is in professional, scientific and technical activities, standing at around 500,000
 - Within this category, the highest number of workforce jobs is in 'other professional, scientific and technical activities', followed by 'legal and accounting activities', and 'activities of head offices; management consulting'
- This is followed by information and communication workforce jobs, followed by real estate, and then finance

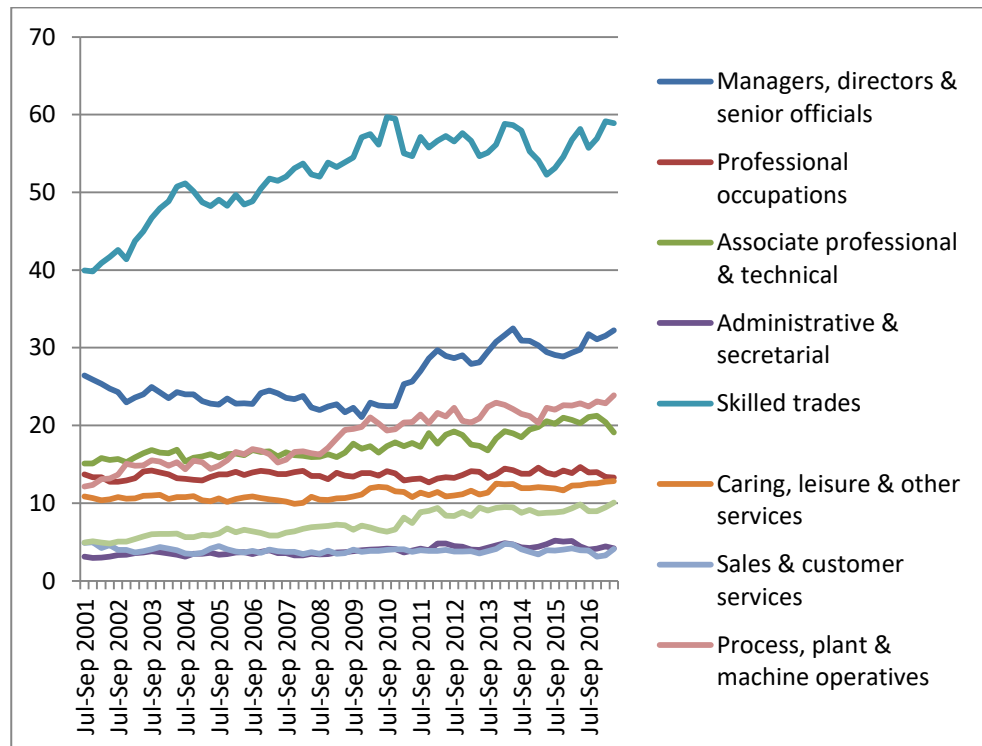
EMP09: Employees and self-employed by occupation**Self-employed people in the UK (thousands) by Occupation (2007 SOC codes)**

- Overall, the number of professional self-employees in the UK, defined as self-employed workers falling under Standard Occupational Classifications (SOC) codes J, K, L and M, is 970,000
- A plurality of people in self-employment in the UK work in 'skilled trades' (1.2m people; 26% of self-employed people)
 - Managers and senior directors make up the second largest occupation by numbers of self-employed people (800,000; 17% of self-employed people)
 - Professional occupations are the third largest (750,000; 16% of self-employed people)
- Almost 100,000 self-employed people work in sales and customer services (2% self-employed people), whilst a further 125,000 work in administrative and secretarial roles (3% self-employed people), and 300,000 working in elementary occupations (6% workforce)

Proportion of people who are self-employed by occupation (SOC code; % industry workforce)

- The occupation with the largest proportion of self-employed people is 'managers, directors and senior officials', with over 50% of the workforce self-employed
 - The next is skilled trades, with over 40%
 - This is followed by 'professional occupations', in which 32% the workforce is self-employed
- In administrative and secretarial work, only 2% the workforce is self-employed, whilst in sales and customer services, its 4%, and elementary occupations, its 8%

Proportion of people who are self-employed by occupation 2001-2017 (SOC code; % industry workforce)



‘Since July 2001, there have been sharp increases in the proportion of the workforce employed as managers, directors and senior officials, as have associate, professional and technical occupations’

- Since July 2001, there have been sharp increases in the proportion of the workforce employed as managers, directors and senior officials, as have associate, professional and technical occupations
 - Skilled trades, process, plants and machine operatives have also seen sustained increases
 - Professional occupations have remained broadly flat

Issues with the Data

- There is a longstanding issue with both the standard industrial classification (SIC) and standard occupational classification (SOC) codes is that they have failed to adapt to a changing labour market
- The last time they were updated was in 2007 – before the numerous transformations that have occurred in the labour market since the financial crisis
- There is a strong case for updating these codes to better reflect the current make-up of the labour market

The number of individuals and the percentage of the self-employed population, by banded self-employment income, 2015/16, UK

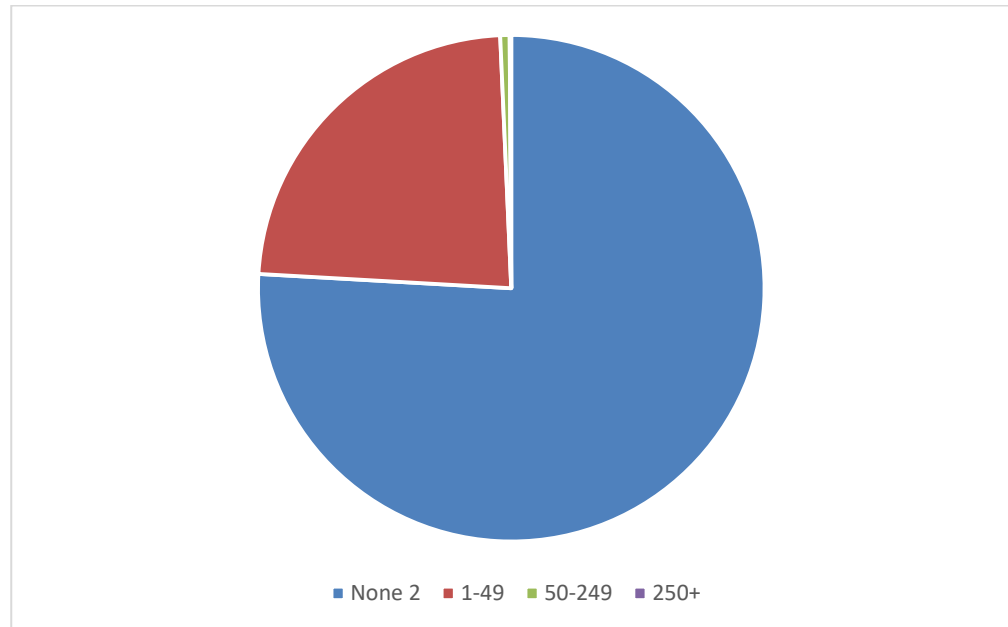
Percentage of the self-employed population by earnings per annum

- 42% of the self-employed workforce, or around 200,000 people, earns over £15,570 per annum

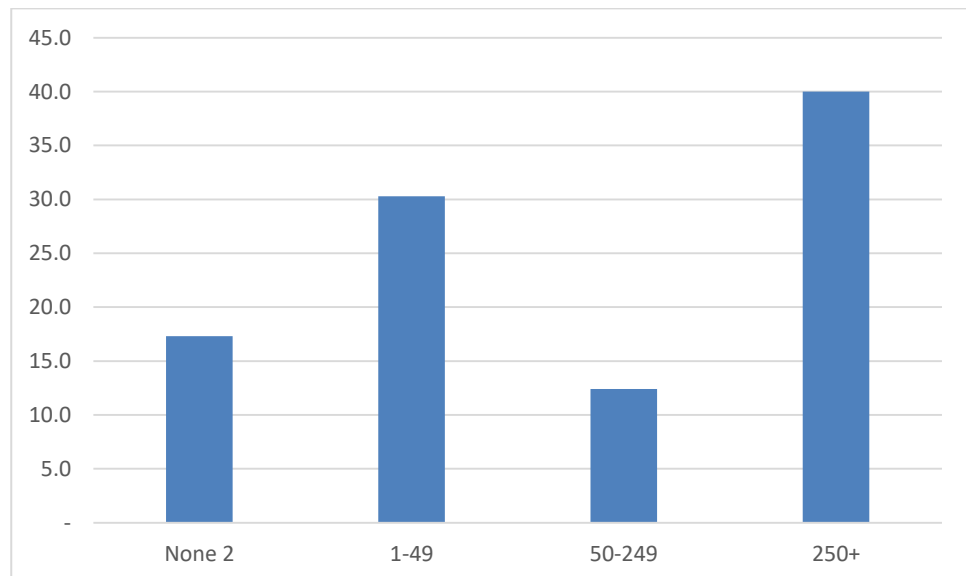
- 37% of the self-employed workforce, or around 175,000 people, earns between £5,965-15,570 per year
- 21% of the self-employed workforce, or around 100,000 people, earns less than £5,965 per year

Business Population Estimates 2016

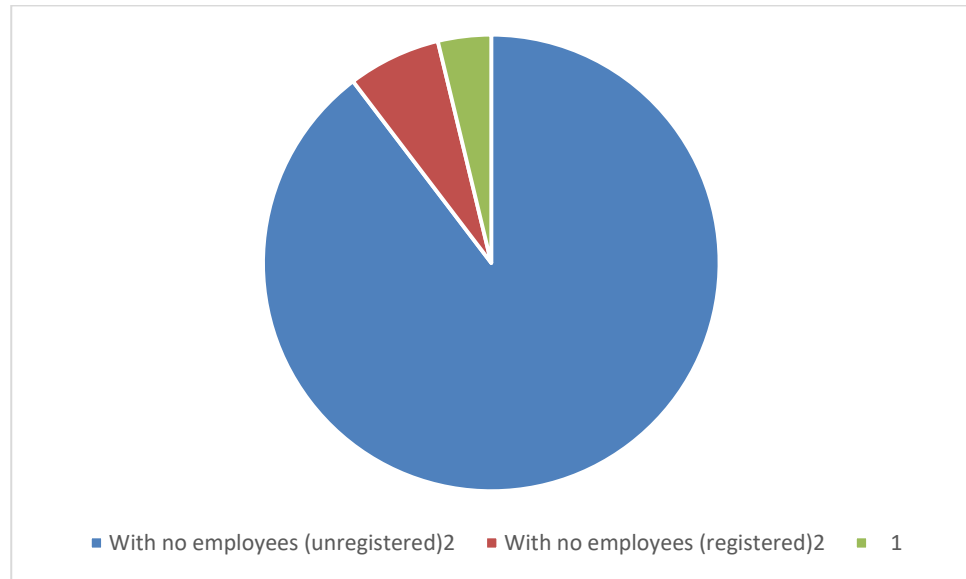
Proportions of UK private businesses by banded size I



Private business employment (thousands) in the UK by size



Proportion of private businesses registered as 'sole traders' by number of employees



'Across the UK as a whole, 76% of businesses has no employees'

- Across the UK as a whole, 76% of businesses has no employees, as shown by chart 1, with 23% of businesses having between 1-49 employees, and only 0.7% UK businesses having 50 or more employees
 - These figures are broadly consistent across the UK's nations and regions, though London and the South East have higher proportions of businesses with no employees than other regions of the country
 - 55.4% of these companies is unregistered, with 20.5% these companies being registered businesses. A further 3% businesses in the UK has just one employee

'There are 3,323,865 businesses registered as 'sole proprietors' in the UK'

- The legal forms these businesses can take include: companies; partnerships; and sole proprietors
- There are 3,323,865 businesses registered as 'sole proprietors' in the UK
 - Of these, 86% is an unregistered business with no employees, 6.3% is a registered business with no employees, and 3.6% is a registered business with one employee
- There are 1,752,915 registered companies in the UK – 46% of these has no employees, and none has just one employee; 30.4% has 2-4 employees
- There are 420,890 partnerships in the UK – 46.7% is unregistered with no employees, 23.6% is registered with no employees, and 8.5% has just one employee

'Businesses with no employees are responsible for creating 17.3m jobs across the UK'

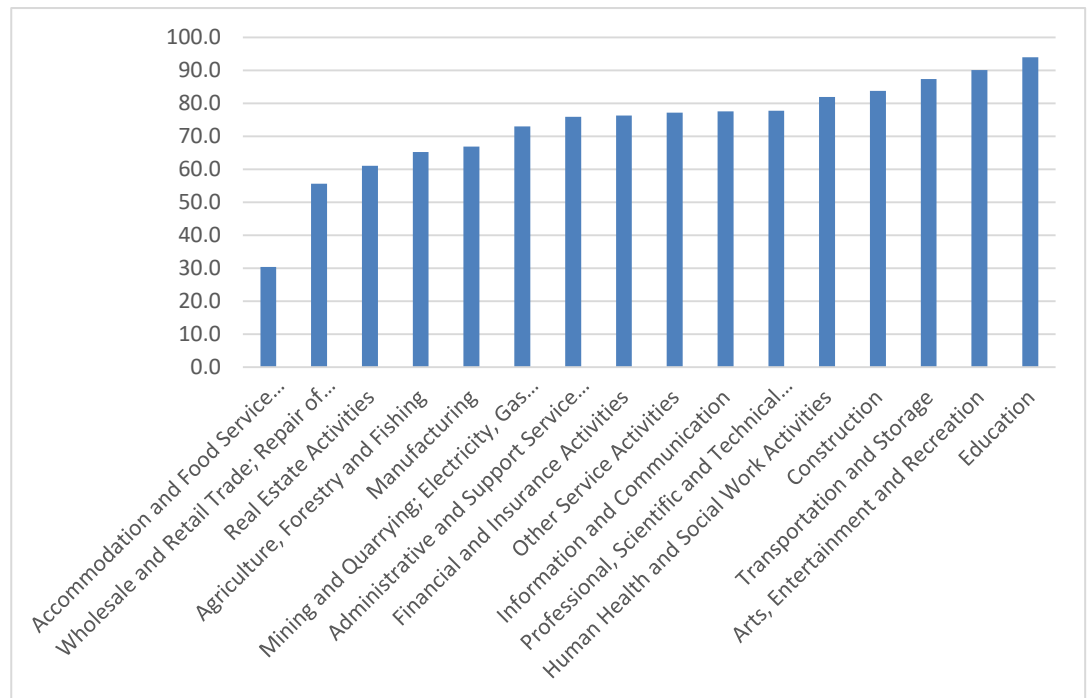
- Businesses with no employees are responsible for creating 17.3m jobs across the UK, including:
 - 17 thousand in the North East, 18 thousand in the North West, 16 thousand each in London, Yorkshire and the East of England, 15 thousand each in the

East Midlands and the West of England, 20 thousand in the South East and 23 thousand in the South West

‘Together, the turnover of these businesses is worth £6.6m’

- Together, the turnover of these businesses is worth £6.6m

Proportion of private businesses with no registered employees by sector



‘Many professional people working independently do so through their own companies, frequently having no or only one employee. Because this data is collected separately, and is itself divided into businesses which are registered or non-registered for VAT, the overall picture of professional people working for themselves – either as self-employed, or employed by their own companies, is highly fragmented’

- The highest number of businesses with no employees can be found in the education sector, in which 94% private businesses has no employees
 - This is followed by ‘arts, education, and recreation’ on 90%, and ‘transportation and storage’ on 87.4%
 - 78% businesses in ‘professional, scientific, and technical activities’ has no employees, and 76.3% finance and insurance companies also has no employees

Issues with the Data

- Many professional people working independently do so through their own companies, frequently having no or only one employee. Because this data is collected separately, and is itself divided into businesses which are registered or non-registered for VAT, the overall picture of professional people working for themselves – either as self-employed, or employed by their own companies, is highly fragmented.
- Similarly to the issues with occupational and industrial classification, the way in which businesses are categorised makes the professional sector hard to disaggregate. For example, by having one single group made up of “professional, scientific and technical”, and another for “business services” it is very unclear how many professional people there are working in this way as part of the UK’s service economy.

‘the way in which businesses are categorised makes the professional sector hard to disaggregate’

Conclusions and Recommendations

Our data analysis has shown:

- Our estimate of the number of professional self-employees in the UK, defined as self-employed workers falling under Standard Occupational Classifications (SOC) codes J, K, L and M, is 970,000
 - However, as argued in this paper, Standard Occupational Classification codes have not kept pace with recent changes in the labour market, and are therefore unlikely to capture all occupations that would currently be regarded as 'professional'. As such, there may be more professional self-employees captured by other SOC codes and therefore not included in this figure.
 - Furthermore, because of the incompatibility of labour force data and business population estimates, we are unable to map one onto the other, and are therefore missing out on a wealth of data pertaining to the types of businesses owned by self-employed professionals.
- With around 33% of the workforce self-employed, the 'professional, scientific, and technical' sector has the fourth highest levels of self-employment by industry.
- In addition, company statistics show that there are 3,323,865 businesses registered as 'sole proprietors' in the UK, as well as 752,915 registered companies in the UK, 46% of which have no employees
- 78% businesses in 'professional, scientific, and technical activities' have no employees, and 76.3% finance and insurance companies also have no employees, suggesting that many of these businesses are vehicles for professionals working in an independent capacity.
- The occupation with the largest number of self-employment is 'managers, directors, and senior officials', with 800,000 people in this sector identifying as self-employed, or 17 per cent self-employed people.
- Professional occupations have the third highest number of self-employed people, standing at 750,000, or 16 per cent of self-employed people. 32 per cent of people working in professional occupations are now self-employed.
- Since July 2001, there have been sharp increases in the proportion of the workforce employed as managers, directors and senior officials, as have associate, professional and technical occupations
- 42% of the self-employed workforce, or around 200,000 people, earns over £15,570 per annum. Unfortunately, whilst we believe a significant number earn well in excess of this figure, there is little or no official data available above this level.

'the professions are being significantly impacted by a shift to more contract-based, flexible "gig" work, but this isn't immediately apparent due to a number of disconnects in the official statistics'

Overall, the data demonstrates that a significant proportion of self-employed people work in professional industries or occupations, many of whom have started their own business.

It also seems clear that the professions are being significantly impacted by a shift to more contract-based, flexible "gig" work, but this isn't immediately apparent due to a number of disconnects in the official statistics. These include: outdated classifications in the grouping of occupations, which haven't kept pace with a changing economy and a fragmentation of statistics relating to professional people spread across data on self-employment, businesses and registered and unregistered companies.

The fastest growth and largest sector of self-employment is 'managers, directors, and senior officials', with 800,000 people in this sector identifying as self-employed, or 17

per cent self-employed people. Over 50% of the workforce in this sector is self-employed, meaning that it is also the sector with the highest proportion of self-employment.

The impact on professional employment is perhaps most clearly seen in the overall shift in employment status for this group, where a third of all those now in professional work are now in some way independent or self-employed.

Clearly, there are a large number of people who make an active decision to be self-employed, and who are broadly happy with their decision to do so. However, with increasing focus on ‘false self-employment’ and insecure work, commentators and policymakers often fail to account for workers in the professional gig economy. As such, a greater understanding is needed of who these workers are, the sectors in which they are working, and the jobs that they are doing in order to inform debate and ensure appropriate policy responses.

Over the course of our analysis, we have found a number of issues with the data collected by the ONS and BEIS.

- There is even greater lack of clarity over the earnings higher up the spectrum of independent and self-employed professional s. 42% of the self-employed workforce, or around 200,000 people, earns over £15,570 per annum yet, although this is a significant group, no official data exists on their earnings above this level.
- We can assume that a sizeable number of higher earners have registered as companies. There are 3,323,865 businesses registered as ‘sole proprietors’ in the UK. Here the picture is further clouded by distinctions in official data between micro businesses registered or not for VAT. Of a total of 3.3m one-person companies, the vast majority (86%) are unregistered with no employees. A further 6.3% are registered as a business with no employees, and 3.6% is a registered business with one employee.
- This is significant because almost three-quarters of all companies registered for tax in the UK operate as single-person entities or have just one employee. There are 1,752,915 registered companies in the UK – 46% of these has no employees, and none has just one employee; 30.4% has 2-4 employees. Of those businesses classified as ‘professional, scientific, and technical activities’ 78% have no employees

‘There is even greater lack of clarity over the earnings higher up the spectrum of independent and self-employed professional s. 42% of the self-employed workforce, or around 200,000 people, earns over £15,570 per annum yet, although this is a significant group, no official data exists on their earnings’

‘The lack of focus on the working practices of professionals in the gig economy is at least part due to the way in which the Office for National Statistics collects data on the labour market’

‘the disconnect between data collected in the business population estimates and the ONS’ labour market data makes it harder to estimate the number of lone contractors and microbusinesses that are actually professional self-employees’

Recommendations

The lack of focus on the working practices of professionals in the gig economy is at least part due to the way in which the Office for National Statistics collects data on the labour market. Many of our labour market statistics have failed to keep pace with the economic changes that have occurred since the financial crisis, meaning that a significant portion of those working in the professional gig economy are invisible in publicly available data.

An improved set of metrics would improve the visibility of the professional gig economy. As such, Standard Industrial Classification and Standard Occupational Classification codes should be reviewed and updated to ensure that they are more aligned with the realities of the modern labour market.

Moreover, the disconnect between data collected in the business population estimates and the ONS’ labour market data makes it harder to estimate the number of lone contractors and microbusinesses that are actually professional self-employees. As such, business population estimates should include a survey as to whether or not the lone contractors and microbusinesses they survey consider themselves self-employed. This will allow for comparison with labour market data collected as part of the labour force survey.

In order to demonstrate that these professional self-employees are broadly happy with their work and are not vulnerable workers being exploited by unscrupulous employers, survey data on the job satisfaction levels of people working in all parts of the gig economy should be collected as part of the labour force survey. This will allow legislators to target only those groups that are being exploited, rather than legislating for the broad and diverse category of self-employed workers.

Overall, policymakers, the media, and professionals themselves need to ensure that any discussions of the gig economy properly account for the significant phenomenon of professional self-employment. Improved measurement of professional self-employment by government will go some way to improving the visibility of this group, but more needs to be done to ensure that the voices of professional self-employees are heard by those determining labour market policy in the UK.

November 2017

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About IPPR

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About Odgers Connect

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