

Home care and digital platforms in Spain

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Published

February 2021

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Executive summary

An ageing population, and high incidence of chronic diseases in old age, represents a major challenge for Spain. It is estimated that by 2050, the country will have one of the oldest populations in the world.

Historically in Spain, the care of infants, the elderly and dependent has been an unpaid job done by women in the family. Over the last three decades, the mass influx of women into paid employment, the limited uptake by men of domestic and care responsibilities, and insufficient public social and care services have largely contributed to what is known today as the social care crisis.

The introduction of the *Ley de Promoción de la Autonomía Personal y Atención a las Personas en Situación de Dependencia*, LAPAD (Promotion of the Autonomy and Care of People in a Situation of Dependency Law, LAPAD) in 2006 represented a major step forward with its universal recognition of the right to care. However, cuts in funding in subsequent years have severely limited the law's potential, and the gap between demand and services offered continues to widen. This means today, the care of the elderly and dependent continues to be a responsibility largely borne by women in the family. They either have to employ someone else (another woman, often foreign) to do the job or do it themselves.

The home care sector is a lucrative, growing industry in Spain with a variety of intermediaries. Families find carers via informal channels such as word of mouth and referrals from public services or non-profit organisations, or through private companies such as placement agencies. In a minority of cases, the companies offering home care services employ the carers themselves. In most cases, the family employs the carer under the Special Social Security System for Domestic Workers, in short, the Special System, with the companies and placement agencies merely acting as intermediaries.

Recently, mostly in the last five years, new intermediaries have entered the sector both in Spain and abroad. Developments in digital technologies and high penetration rates of communication and information technologies have been fuelling the expansion of digital platforms across sectors, and home care is no exception.

Yet the growing body of literature on the platform economy has so far paid little attention to home care and the overlapping field of domestic work. They are segments of the economy characterised for having an overwhelmingly female workforce and being highly precarious and socially undervalued. In Spain, a large proportion of carers and domestic workers are foreign, and many receive cash in hand and work without a contract or social protection. A third of the domestic work sector is thought to be undeclared.

This report is a first step towards addressing this literature gap on the home care sector. It draws on desk research and interviews with key informants, including platform founders and academics and set out to answer the following questions:

1. What does the landscape of the emerging digital care sector look like? Which are the main digital platforms operating in this sector?

The modernisation, professionalisation and formalisation of the sector is an ambition widely expressed by the emerging platforms. The research, therefore, also looked into:

2. What are the potential implications of the rise of digital platforms regarding the formalisation and professionalisation of the sector?

This report focuses on the eight companies identified through the research that were founded in Spain and specialise in home care. These follow two distinct models: the on-demand model and what we refer to as the digital placement agency one.

This initial work offers several insights. One is the need for a nuanced platform typology and a sector-specific analysis of platforms operating in home care. As pointed out by academics, the use of the Uber model as a framework is severely limited when studying this sector. The notion of trust, for example, takes on a much more important role than in other sectors. The needs in long-term care can differ greatly from the need in on-demand, short-term care. Also, the employer in long-term home care is often the family, which has implications not found in other platformised industries.

Another learning is the need to contextualise the emergence of these new actors. In the case of Spain, platforms might have more agile and automated processes compared to traditional placement agencies. They have scaled to now offer services across cities with minimum infrastructure. However, the externalisation and commodification of care, and families using intermediaries to find a carer, pre-dates the rise of digital platforms.

Likewise, attempts to formalise and professionalise the sector, an ambition often championed by the new intermediaries, also pre-date the rise of platforms and have proved challenging in the past. These concepts need to be unpacked and treated with caution. As this report discusses in section four, the digital platforms that require the formalisation of the user-carer relationship (as domestic workers) under the Special System, as a prerequisite for users to employ platform services, are helping reduce the number of informal work arrangements. This is a cause for celebration, however, in itself, it does not guarantee further professionalisation of the sector. Strictly speaking in this case, there is no increase in the actual numbers of carers employed as *professional carers* by local authorities or companies themselves.

Moreover, professionalisation involves formal training, accreditation and a periodic revision of professional skills by the authorities. Aside from what the platforms can do individually like offering their own training or setting entry requirements, they do not have competencies in any of these areas and appear to have a limited impact on the overall professionalisation of the workforce.

The question remains on the role of platforms and technology in promoting decent work. Even in the cases where a contract formalises the working relationship, this does not, by definition, go hand-in-hand with decent working conditions. Ensuring home carers are valued socially and enjoy full rights and decent working conditions, requires the participation of all social actors involved, including workers themselves.

Finally, this report ends with a call for further research on the home care sector, including the experiences, motivations and working conditions of those finding work, and also of those finding carers, through the new intermediaries of the digital era.

Introduction

Increasingly older populations and a high incidence of chronic diseases in old age represent a major challenge in countries across the world, and Spain is no exception. Both in Spain and abroad, long-term care has become a segment of the economy that has grown continuously, with the number of private companies and investment funds entering the space experiencing a boom over the last five years.¹ This is a trend that is likely to continue. It is estimated that by 2050, Spain will have one of the oldest populations in the world.²

The Spanish “familiarist” welfare system is typical of southern European countries and relies heavily on families. Traditionally, female relatives, such as wives, mothers and daughters have provided the care of the elderly, dependent and infants in the private sphere of the home.

The 1980s and 90s presented a challenge for the functioning of the familiarist system in Spain with the mass incorporation of women into paid employment.³ This phenomenon, added to an increased demand for care due to an ageing population, limited advances made towards a more gender-equal share of care and domestic work responsibilities, and insufficient public, social and care services have all combined to result in the present day’s “social care crisis”. The need for long-term care has grown at a faster pace than the political capacity to respond, in the context of an already fragile, familiarist welfare system.

The response to the crisis has so far largely been to continue promoting the home as the ideal place for long-term elderly and dependent care, and increasingly, the privatisation-externalisation of care services. Care homes are commonly publicly owned and privately run (characterised by competitive bids to offer the lowest price, short-term partnership agreements and consequently, precarious and unstable working conditions for staff).⁴ Although the *Ley de Promoción de la Autonomía Personal y Atención a las Personas en Situación de Dependencia, LAPAD* (Promotion of the Autonomy and Care of People in a Situation of Dependency Law, LAPAD), introduced in 2006, brought with it advances such as the universal recognition of the right to care, cuts in funding over the following years mean there continues to be a widening gap between the demand and offer of care services. The public services and benefits do not reach all who need long-term care, and private care options remain unaffordable for many.⁵ Today, the care of the elderly and dependent still largely relies on families, and especially on women, to either do the work themselves or to employ someone external (usually also a woman, oftentimes foreign) to do it.⁶

Families employing carers typically find someone through word of mouth, informal networks, hospital boards, notices like those found on lamp posts, internet sites, and referrals from health and social care services, as well as through non-profit organisations and private actors. Some companies offer home care services and employ the workers themselves. This, however, is not common practice. Most placement agencies and companies merely act as intermediaries between the carers and the families. Out of these, there are two types. One model simply makes the selection and puts both parties in contact. The other model connects

¹ Recio 2020

² OECD 2017

³ This is not to say that women were not in the labour market prior to this time. Working class women especially have always been in paid employment.

⁴ Martínez Virto 2010

⁵ In 2017, the average cost of a private care home was 1.777 EUR a month, in contrast with the average 917.71 EUR monthly pension for that year. Data source: Inforesidencias.com 2017 and La Moncloa 2020

⁶ Martínez Virto 2010

the parties but also takes responsibility for registering the worker on the social security system on behalf of the client, under the Special Social Security System for Domestic Workers, and carries out administrative duties, eg payslips.

Against this backdrop, and within the context of a growing global platform economy, new digital intermediaries have emerged in Spain, tapping into the need for long-term care services. This phenomenon has been described by some in the media as the “uberisation” of the care sector.⁷

Spain is not alone in this new development.⁸ The recent emergence of digital labour platforms in the care sector marks an upward trend across Europe.⁹ The same is true for other geographies, with on-demand platforms offering care and other domestic services growing in countries such as the United States, the United Kingdom, India, South Africa and Mexico.¹⁰ Despite this, it is a sector largely ignored by the growing body of literature on the platform economy.¹¹

Across the world, the home care sector, like the overlapping field of domestic work, remains invisible and socially undervalued.¹² The workforce in Spain, like in the rest of the world, is overwhelmingly female, with large proportions of foreign workers. Informal working arrangements are widespread, many receive payment cash-in-hand and work without a contract or social protection. A third of the domestic work sector in Spain is estimated to be undeclared. Worldwide, common characteristics of care and domestic work include informality, job insecurity and often, exploitation.^{13, 14} In a way, as the US National Domestic Workers Alliance and others say, domestic workers are the original gig workers.¹⁵ Therefore, any new actor that offers the potential of disrupting this sector, making it more “formal and professional”, merits close attention.¹⁶

About this report

This report represents a first step towards addressing the knowledge on this sector gap in the literature and public debate on the platform economy. The purpose of the research was to map out the landscape of the new digital intermediaries operating in the home care sector in Spain. The main questions the research set out to answer were:

1. What does the landscape of the emerging digital care sector look like? Which are the main digital platforms operating in this sector?

⁷ Magallón 2020

⁸ Digital Future Society 2019

⁹ Trojansky 2020

¹⁰ Hunt and Machingura 2016

¹¹ Digital Future Society 2020

¹² Recio Cáceres 2010

¹³ Addati et al. 2018

¹⁴ ILO 2010

¹⁵ Feliciano Reyes 2019

¹⁶ Hunt and Machingura 2016

Some of the literature on platforms operating in other highly feminised sectors, such as the beauty or domestic work sectors in India, discusses the role of these digital intermediaries in professionalising and formalising these types of work. As the platforms emerging in the home care sector in Spain also express this ambition, it was thought valuable to also ask this question:

2. What are the potential implications of the rise of digital platforms regarding the formalisation and professionalisation of the sector?

Report structure

The first section of the report sets the scene by offering an overview of the home care sector in Spain. The second and third sections provide an outline of the new digital platforms identified through the research. The fourth part of the report addresses the potential these have for formalising and professionalising the sector. The fifth section then gives an overview of key research undertaken in other countries on digital platforms mediating home care and domestic work more widely. The conclusion presents the key questions that have arisen from the analysis and that further research could investigate.

Methodology and scope

The content of this report draws on desk research and semi-structured interviews with key informants including platform founders, a trade union representative, researchers in Spain, the UK, India and the US, and a member of the International Labour Organisation (ILO), based in Switzerland.

The interviews took place in May and June 2020 with correspondence continuing until December 2020. The content specifically relating to platforms operating in the home care sector included in this report corresponds to this timeframe.

The desk research identified several platforms operating in Spain, described on page 26. It is possible to group them according to whether they were founded in Spain or abroad, and whether they specialise in elderly and dependent care or whether they offer multiple household services.

After mapping the platforms, the research then focused on the companies specialising in the home care sector. From a methodological perspective, there was an interest in identifying patterns, and this meant it was important to compare platforms in the same sector. The dynamics and workforce of the home care sector differ from those of, for example, maintenance work, personal training or private tutoring, even if these activities also take place in the home. Therefore, this report focuses on the companies specialising in home care.

Sections two and three of this report largely draw on interviews with the founders of five platforms (Aiudo, Cuideo, Depencare, Familiados and Joyners) as well as information extracted from internet-based sources on three other platforms identified to be specialising in home care (Cuidum, Cuorecare and Wayalia).¹⁷

¹⁷ The mapping initially identified nine platforms specialising in home care but this report includes information on eight of them. This is because, in the time that passed between doing the interviews and editing the report, and against a backdrop of regulatory changes and media pressure building around social conceptions of “platforms”, one of the organisations revoked its participation.

Defining concepts

Platform

One of the complexities of studying the platform economy is the lack of consensus around terminology. The word platform is also used as short-hand to mean different things.

One definition of platforms is: “hybrid organisations that combine the characteristics of firms and markets (Casilli and Posada 2019) and coordinate user exchanges through the aid of technological infrastructures, such as mobile apps and websites (Nieborg and Poell 2018). The dual nature of platforms, as firms and markets, means that, on the one hand, they present clear hierarchies, business models, and managerial strategies; for instance, by devising algorithms that serve as managerial control over the workers (Rosenblat and Stark 2016). On the other hand, they coordinate market exchanges and regulate their internal prices. A known example is the surge price algorithm that regulates the fares of ride-hailing platforms such as Uber and Lyft (Rosenblat 2018).”¹⁸

As explained above, this initial scoping of the digital home care sector has found several Spanish tech companies that have emerged over the last five years. These have either self-identified or been referred to as platforms by others (media, investors and internet forums, etc.), sometimes both. As discussed in sections two and three of this report, their models vary significantly. Some of the companies follow an on-demand model, while others follow a model that resembles that of a traditional placement agency.

The home care sector

The home care sector encompasses a vast array of public and private-funded services, and professional and informal occupations, across both the social and health-care spheres. This report focuses on care services mediated, or provided by, private actors, in this case tech-based start-up platforms, to elderly and dependent persons, in the home.

Regarding the definition of care in Spain, according to the LAPAD law:

Professional care is defined as that “offered by a public or private institution, for or not-for-profit, or by an independent contractor, whose purpose is to offer services to people in dependant circumstances, whether that is at home or in an institution”.¹⁹

Non-professional care is defined as that “provided to dependant people in their home, by relatives or people from within their networks, that is not connected to a professional care service”.²⁰

Basic day-to-day activities are defined as “the most elemental activities carried out by a person, which allow them to function with a minimum amount of autonomy and independence. These activities include personal care, basic domestic activities, essential mobility, being able to recognise people and objects, find one’s bearings, understand and execute instructions or simple tasks”.²¹

¹⁸ Posada and Shade 2020

²⁰ Ibid.

¹⁹ Jefatura del Estado 2006

²¹ Ibid.

Audience

The report is primarily for policymakers in Spain and elsewhere, especially those who are participating in future of work commissions and debates or working on labour regulation. The report should also prove to be a useful tool for academics, trade unions, workers' associations, activists, the private sector, and in general, any other stakeholder, in Spain or abroad, who is studying this topic and involved in the current debates around platform work.

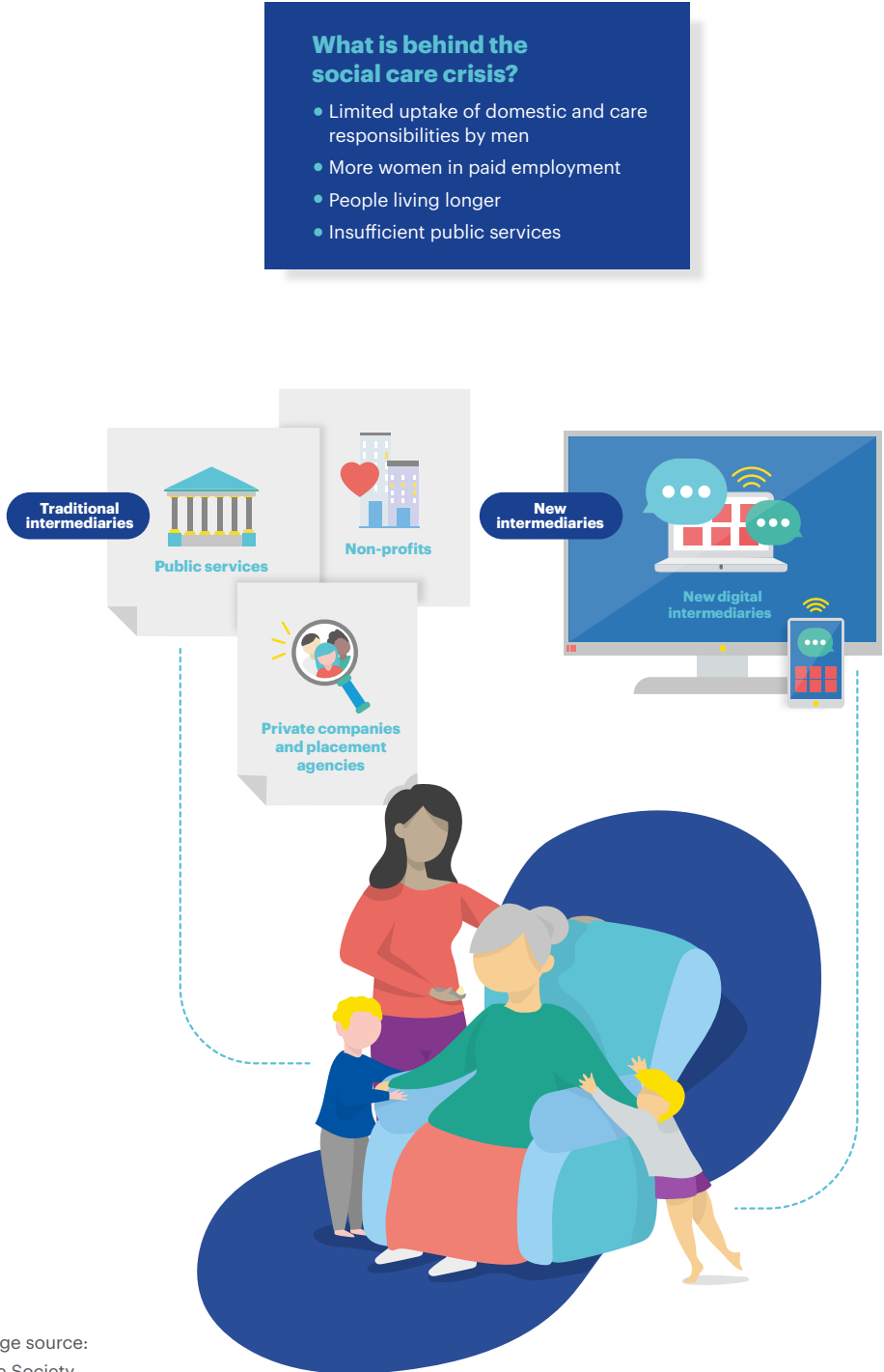


Figure 1. Image source: Digital Future Society.



Setting the scene

The care sector in Spain

In Spain, the care of children, the elderly and dependent people has historically been an unpaid job carried out by women, oftentimes relatives (mothers, daughters, partners, sisters), in the private sphere of the home.²²

The familiarist welfare regime

Similar to other southern European countries like Italy and Greece, the Spanish social protection system has traditionally relied heavily on families and relatives.²³ The so-called “familiarist welfare regime” is made up of a combination of publicly financed home care services, and informal and family care arrangements supported by state allowances and tax benefits.²⁴ As discussed further below, another characteristic of the Mediterranean model relates to the mass entry of women into paid employment, men’s limited uptake of their share of domestic and care work responsibilities and insufficient public services. Together, these phenomena have largely resulted in the externalisation of care, mainly to female migrants employed as domestic workers, that has gradually replaced the unpaid care done by native women. This has signified a transition from a family model of care to a “migrant in the family” one.²⁵

Profile of the person requesting SAAD services and benefits

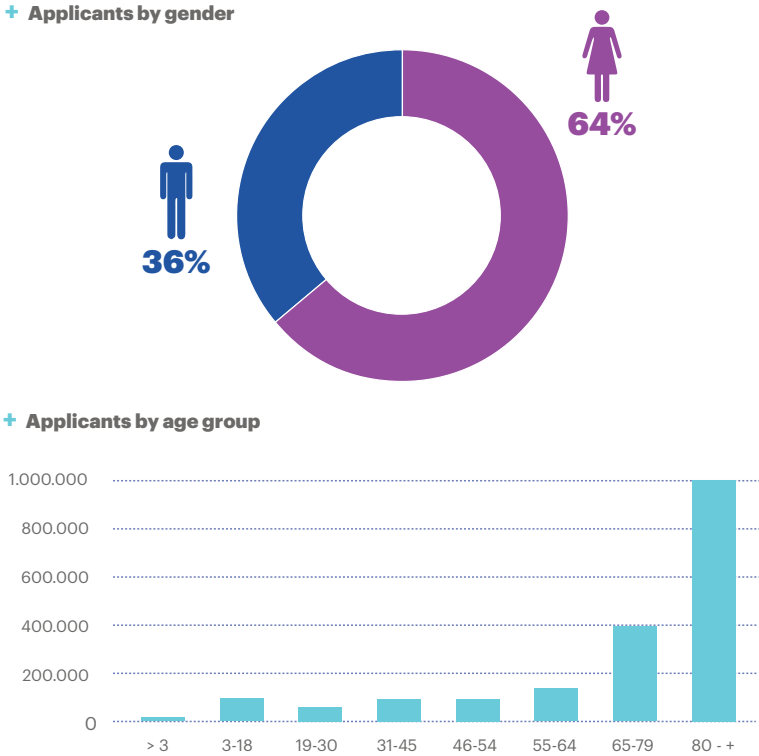


Figure 2. Who uses SAAD services? Image source: Digital Future Society. Data source: IMSERSO 2020d

²² INE 2009

²⁴ Advancing Personal and Household Services 2019

²³ Bettio et al. 2016

²⁵ Bettio et al. 2016

The scale of home care

Three factors make it challenging to know the real numbers of women and men providing home care in Spain. One difficulty is that the frontier between care work and other tasks undertaken in the private sphere of the home is often blurred.²⁶ Care and non-care activities are highly intertwined.²⁷ The same service, such as cleaning or cooking, can be considered care or not, depending on who is the recipient.

This means in the home of an elderly person, cooking and cleaning usually fall under the definition of “care” of that person. Whereas if these activities are done as stand-alone services, for example in the house of a professional couple when they both go out to work, then these activities would not be considered to be “care” but “domestic work”.²⁸ It is also not uncommon for women employed as domestic workers to do household cleaning a few hours a week, to also care for a child who is missing school due to illness, or an elderly relative in the household, which blurs this boundary even further.

Furthermore, both in Spain and abroad, academic literature, national public policies and employment statistics often include home care work within the concept of domestic work.²⁹ Some authors criticise this, arguing it renders care work invisible.^{30, 31} Domestic work includes a range of activities, including caring for children and elderly but also cleaning, maintenance, gardening, shopping, cooking and private lessons. This means there is employment data on the number of domestic workers, but it is unknown how many of these are working as carers.³²

A third factor that makes it difficult to know the true scale of home care work is that a significant portion of the work is undeclared. According to data from the National Statistics Institute’s (INE’s) Economically Active Population Survey (EAPS), in 2019 there were 595,200 domestic workers, but social security affiliation figures were considerably lower, showing just 410,634 affiliated workers.³³ Estimates indicate that a third of domestic workers are working in the undeclared economy.³⁴

Home care: highly feminised and “foreignised” work

In 2020, according to data from the Institute for the Elderly and Social Services (IMSERSO), 89% of the so-called “non-professional carers” (relatives caring for an elderly or dependent person and receiving state financial benefits through the SAAD system, described below) are women.³⁵ The EAPS from the third quarter of 2020, shows that 87% of people employed by families as domestic workers (many of whom are in a caring role) were women.³⁶ The care of the elderly and dependent

²⁶ For some institutions such as the ILO domestic work encompasses all care and non-care activities (what the entity refers to as direct and indirect care activities) that take place in the household within an employment relationship. These would include activities such as gardening and chauffeuring. Source: ILO 2012

²⁷ Advancing Personal and Household Services 2019

²⁸ IMPact 2020

²⁹ Díaz Gorfinkiel and Martínez-Buján 2018

³⁰ León 2010

³¹ Díaz Gorfinkiel and Martínez-Buján 2018

³² See Annex for more information on employment statistics regarding domestic work in Spain

³³ INE 2019

³⁴ Zaguirre Altuna 2019

³⁵ IMSERSO 2020a

³⁶ INE 2020

in institutions such as residential homes and day centres is also undertaken by an overwhelmingly female workforce (84% in the third quarter of 2020).³⁷ Finally, EAPS figures for those employed in health and social care activities also reflect a feminised workforce (77%).³⁸

The home care sector, and the overlapping domestic work sector, is not just highly feminised. Over the last three decades, the sector has expanded and also become “remarkably foreignised”. Domestic work represents nine percent of women’s paid employment, yet a full fifth of foreign women’s employment.³⁹

As discussed above, the increase in the numbers of Spanish women entering the paid labour force, the continued lack of involvement of men in household and care work, and inefficient and insufficient public services has resulted in the caring of children and the elderly becoming a job undertaken by *other* women, many of them migrants.⁴⁰ This phenomenon is known as the global care chain.⁴¹

In September 2020, 42% of domestic workers registered on the social security system were foreign-born (158,901 out of a total of 373,200).⁴² No other occupation has such a high volume of foreign workers.⁴³

To put these figures in context: in September 2020, foreign-born workers represented 11% of all workers registered on the social security system.⁴⁴

There are no official statistics for the proportion of foreign women working as live-in carers although some estimate the figure to be as high as 80%.⁴⁵

There is also an argument that the familiarist welfare regime and the migration model of the last two decades have “converged in facilitating and even encouraging the expansion of the household sector as the main site of care provision for the elderly and small children.”⁴⁶

³⁷ IMSERSO 2020c

³⁸ INE 2020

³⁹ Zaguire Altuna 2019

⁴⁰ León 2010

⁴¹ Díaz Gorfinkiel and Martínez-Buján 2018

⁴² Ministerio de Trabajo y Economía Social 2020

⁴³ Díaz Gorfinkiel and Martínez Buján 2018

⁴⁴ Secretaría de Estado de la Seguridad Social 2020

⁴⁵ Martínez Buján 2011

⁴⁶ León 2010

The global care chain



Figure 3. Image source: Digital Future Society

+ Non professional carers, by gender

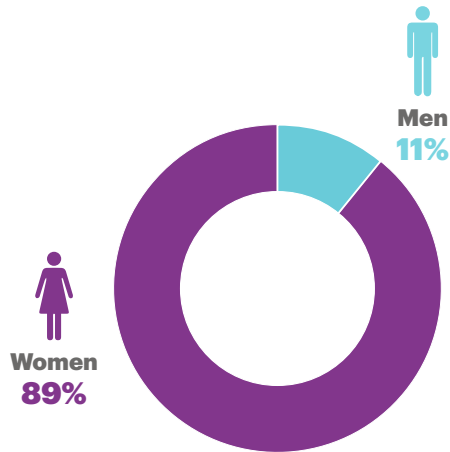


Figure 4. Image source: Digital Future Society.
Data source: IMSERSO 2020a

+ Domestic workers, by gender

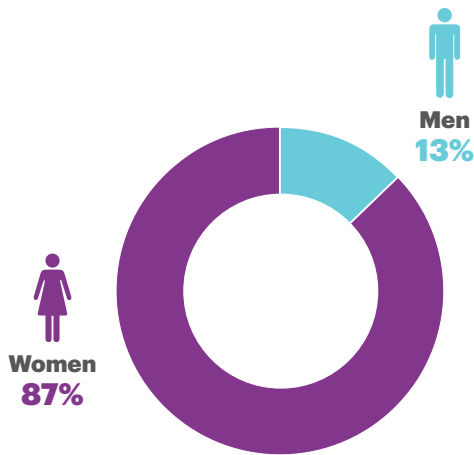


Figure 5. Image source: Digital Future Society.
Data source: INE 2020

+ Proportion of carers working in institutions such as care homes and day centres, by gender

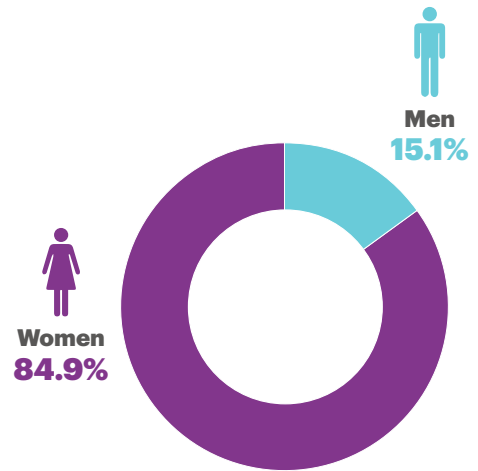


Figure 6. Image source: Digital Future Society.
Data source: IMSERSO 2020c

+ Domestic workers registered on social security system

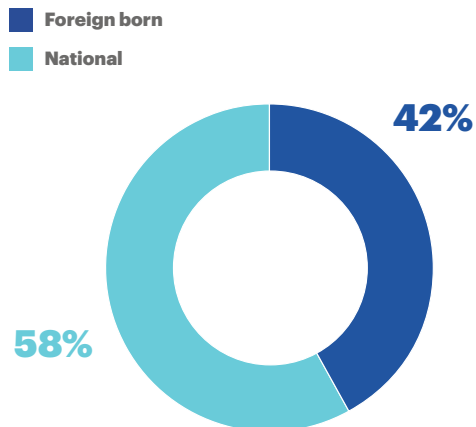


Figure 7. Image source: Digital Future Society.
Data source: Ministerio de Trabajo y Economía Social 2020

+ All workers registered on social security system

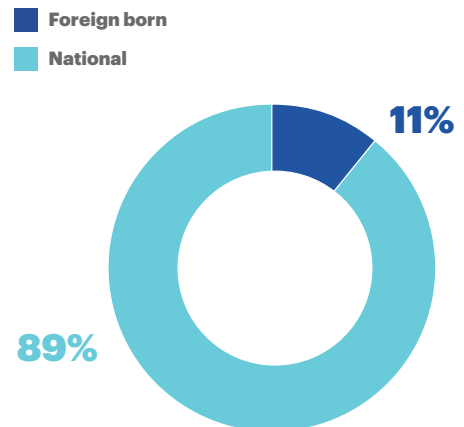


Figure 8. Image source: Digital Future Society.
Data source: Secretaría de Estado de la Seguridad Social 2020

The regulatory landscape

Home care and domestic work in Spain are two distinct sectors, regulated by different labour and social security legislation. Law 39/2006 (the LAPAD Law) regulates home care services for people in a situation of dependency. Professional carers are employed under the General Regime of the Social Security System, known as the General Regime. Whereas domestic work falls under the jurisdiction of the Royal Decree (RD) 1620/2011. Domestic workers are employed under the Special Social Security System for Domestic Workers, in short, the Special System. In practice, as seen below, many families employ domestic workers to provide care for the elderly and dependent.

The regulation of home care in Spain

Spain initiated reforms in 2006 to regulate and professionalise the care sector by introducing Law 39/2006, otherwise known as LAPAD or the *Ley de la Dependencia* (Dependency law).⁴⁷

This was a turning point in Spain's social policy regarding care for it recognised citizens' right to care and aimed to professionalise the care sector. With this law, Spain set up an ambitious programme to achieve universal coverage and generate employment and income.⁴⁸ The law establishes three levels of dependency according to the difficulty found in carrying out basic activities of daily life. LAPAD created the *Sistema para la Autonomía y Atención a la Dependencia*, SAAD (System for the Autonomy and Care for Dependency, SAAD) to administer the provision of services and economic benefits according to the assessed level of dependency.

The services include access to residential care, day and night centres, tele-assistance and *Servicio de Asistencia Domiciliaria*, SAD (home care support, SAD). Services are provided by public institutions or by subsidised private centres. The economic benefits help people to pay for professional care services, at home or in an institution, or pay a "salary" to family members who care for a dependent. The law considers these family members to be "non-professional carers" (in relation to the "professional carers" who work in residential care, day centres and as home carers, through the SAD services).

In fact, one of the law's achievements is that it allowed for non-professional family carers to register and pay contributions to the social security system, have a pension in old age and access formal employment training even without a contract.⁴⁹

However, these achievements are a double edge sword. Seen by many in a positive light, the law has also received criticism for incentivising and perpetuating female relatives' role as caregivers. LAPAD intended for the option of providing monetary benefits to family members to be a last resort. In fact, it has become the single most common arrangement (and for the state, a less expensive option than building more public residential homes or employing professional carers), undermining the government's original efforts and ambition

⁴⁷ Jefatura del Estado 2006

⁴⁸ Picchi and Simonazzi 2014

⁴⁹ Additionally, the law established that the state would pay the non-professional carer's social security contributions. This was then revoked in 2012 and until 2019 it was the carers themselves who were responsible for registering on the social security system and paying their own contributions. Since 2019, the state is once again the one paying these social security contributions.

to professionalise the sector.⁵⁰ In September 2020, on average across Spain, economic benefits for family caregivers accounted for 31.49% of all the benefits provided while home care services – tele-assistance (17.66%), home care (17.51%), and day/night residential care (6.45%) – accounted in total for 41.62%.⁵¹ It must be noted this is an average across Spain and there can be significant differences across regions.⁵² Families have even been found to use the economic benefits received through LAPAD, meant for paying a family caregiver, to instead employ an external carer, from outside the family, contracted as a domestic worker under the Special System for Domestic Workers.⁵³

The regulation of domestic work in Spain

Royal Decree 1424/1985 regulated paid domestic work in private households from 1985 until 2011, when Spain reformed the labour and social security legislation on domestic work and introduced the Royal Decree 1620/2011.⁵⁴ Historically, labour law rights in the domestic work sector were significantly lower than in other sectors. The 2011 reform attempted to improve the working conditions of domestic workers and responded to calls for equalising their rights and protections with those of other sectors.⁵⁵ That year the government also modernised the social security system: the Law 27/2011 integrated the Special Social Security System for Domestic Workers into the Social Security General Regime, albeit under a separate system (the Special System for Domestic Workers).

Some of the changes the Royal Decree 1620/2011 introduced were the right to a written contract, the applicability of the Minimum Interprofessional Wage to domestic workers and establishing a maximum threshold of 30% of the wage for “in-kind payment” such as accommodation and food. The reform also fixed at 40 hours the statutory maximum working week and a minimum rest of 12 hours between working days. The law obliges employers to register and pay for workers’ social security contributions from the first hour worked (prior to 2011, payment of social security contributions was an obligation when the worker was working 20 or more hours a week in the home). Finally, the government set a new inter-professional minimum wage for all workers in 2018, which upgraded the minimum wage for all including domestic workers.⁵⁶

As mentioned, under the 1620/2011 law, employers are responsible for the payment of contributions for all hours worked, from the first hour. However, not long after this law came into force, the Royal Decree 29/2012 also took effect. The newer law stipulates that in the case of workers who work 60 hours or less a month in a home, the worker herself is responsible for registering and paying contributions to the social security system.⁵⁷ There has been vocal criticism of the fact this new law places the responsibility of affiliation and contribution onto the worker, even though the law states the employer is still responsible for paying the worker for their part of the social security contribution. This has been criticised as a step backwards in regard to the progress made by RD 1620/2011.⁵⁸

⁵⁰ Moreno-Colom et al. 2016

⁵¹ IMSERSO 2020b

⁵² Secretaría Confederal de Política Social y Movimientos Sociales de CCOO 2018

⁵³ Martínez Buján 2011

⁵⁴ Ministerio de Trabajo e Inmigración 2011

⁵⁵ Pavlou 2016

⁵⁶ Advancing Personal and Household Services 2019

⁵⁷ Jefatura del Estado 2012

⁵⁸ UGT 2013

Fifteen years on since LAPAD: families still filling the gap

Almost fifteen years on from the creation of the LAPAD law, the reality is that the care services do not reach everyone who needs them.⁵⁹ The administrative process is often too long and financial resources insufficient – especially since the austerity measures initiated in 2012 have severely cut funding from what was an already fragile and under-resourced social security and care system.⁶⁰ Waiting lists are long and many elderly people with a recognised degree of dependency wait for months before receiving any support, some die while waiting (32,035, or eight percent, of those on waiting lists died before receiving support in the first six months of 2020).⁶¹ This is something repeatedly denounced by the State Association of Directors and Managers of Social Services.⁶²

So, although the LAPAD law recognised citizens' universal right to care and aimed to professionalise the home care sector, in reality, families largely continue to fill the gap. They do this either by providing the care themselves or employing someone. It is a cheaper and more flexible option for a family to employ a worker themselves and register them under the Special System than it is to contract the services provided by a company. The employer-families do not have to pay VAT for instance, and the contractual arrangement under the Special System is more flexible and legally allows for a greater amount of working time than if they were to pay a company who employs the carer.⁶³ Furthermore, by law, families contracting live-in carers need to do so under the Special System as under the General Regime workers can only work a maximum 40-hour week. So, there is no option for a private company, for instance, that employs home carers, to offer live-in services. In 2010, at least 10% of Spanish households with an elderly person had contracted a domestic worker for care work.⁶⁴ In contrast, only 0.4% of households with an elderly person were contracting a carer through a private entity (and therefore contracted as a professional carer through the General Regime).⁶⁵

In 2019, Spain had almost a third of Europe's domestic workers – second only to Italy.⁶⁶ In contrast, Spain has a much smaller volume of workers involved in care-related occupations, such as institutional care work, compared with other countries like Germany or France.⁶⁷ The general practice of informally employing domestic workers via the underground economy, or formally under the Special System, to cover the care needs that public services should meet has been denounced repeatedly by the trade union UGT and other organisations.⁶⁸ In other words, for the state, this set-up represents a "low-cost" home care model.⁶⁹

⁵⁹ In 2018, CCOO reported that, according to official figures, the SAAD services attended 967,835 people, although people with a recognised degree of dependency went up to 1,261,008 (293,173 on waiting list) and another 127,910 were waiting to be assessed. Data source: Secretaría Confederal de Política Social y Movimientos Sociales de CCOO 2018

⁶⁰ Asociación Estatal de Directoras y Gerentes en Servicios Sociales. n.d.

⁶¹ Asociación Estatal de Directoras y Gerentes en Servicios Sociales 2020

⁶² Ibid.

⁶³ Díaz Gorfinkiel and Martínez-Buján 2018

⁶⁴ INE 2009

⁶⁵ Díaz Gorfinkiel and Martínez-Buján 2018

⁶⁶ UGT 2019

⁶⁷ Ibid.

⁶⁸ UGT 2019

⁶⁹ Otaegui 2013

The professionalisation of care

One of LAPAD's core motivations is the recognised need to professionalise care and offer quality public service. That said, the concept of professionalisation in LAPAD is quite vague and limited to identifying professional care as that which is not provided by family members. The law is also quite ambiguous when it comes to defining the quality of service, reducing it to a mention of the need for progress in quality employment and the need to define training requirements.⁷⁰

Regarding the educational requirements, according to the LAPAD law, the professional carers employed by public institutions or private entities are contracted under the General Regime. They need to accredit a minimum amount of training or experience and hold a Certificate of Professional Qualification.⁷¹ In the residential care sphere, the obligation to have this certificate has been postponed until December 2022.⁷² Many women started working in residential care with experience but without any formal qualifications, and skills accreditation and certification is now proving to be a complex process.

Meanwhile, there is no requirement for family relatives who are in a caring role and receiving economic benefits to accredit any training or certification.

Finally, in practice, many families are employing domestic workers to provide home care services and by law there is no requirement for domestic workers to provide any skills accreditation or certification.

Section four of this report will look at professionalisation and formalisation in greater detail.

Working conditions in the domestic work sector

The Collective Agreement on Care Services for Dependent People and Development of Personal Autonomy regulates the working conditions of carers, when employed by public or private companies.⁷³ However, there are no collective agreements providing protection for domestic workers. They are only protected by some general dispositions included in the Special System of Domestic Workers.⁷⁴

The home care sector is characterised for offering precarious part-time employment, unstable and unpredictable income, and low social security contributions and pensions.⁷⁵ In particular, live-in carers often face abusive working conditions.⁷⁶

⁷⁰ Moreno-Colom et al. 2016

⁷¹ Servicio Público de Empleo Estatal 2020

⁷² Ministerio de Educación, Política Social y Deporte 2008

⁷³ Ministerio de Trabajo, Migraciones y Seguridad Social 2018

⁷⁴ Ministerio de Trabajo e Inmigración 2011

⁷⁵ UGT 2019

⁷⁶ Recio Cáceres 2010

Although the 2011 reform brought in significant advances for those employed as domestic workers, there is still a way to go for domestic workers to enjoy the same rights and social protection as other employees. One of the major criticisms is that domestic workers are exempt from receiving unemployment benefits – a feature temporarily revoked during the state of alarm as a result of the Covid-19 crisis and one which advocates demand should become a permanent amendment.

Furthermore, domestic workers are the only collective who can see their employment terminated without cause. There is also no legal penalty for dismissing pregnant domestic workers, although there are already court sentences that have declared these dismissals invalid for violating basic human rights.⁷⁷ Also, the current social contribution system is based on ranges. It does not take into account the reality of the sector, where it is common for women to provide several or many services of only a few hours each, in different homes. The real salary obtained from each home often falls well below the minimum bandwidth. This disincentivises the registration and payment of fees, and therefore the formalisation of the job.⁷⁸ Low and intermittent social security contributions very often result in low pensions. According to the UGT report, the average pension on the Special System for Domestic Workers of 511 euros is the lowest of all social security systems, which average 944 Euros.⁷⁹

Finally, domestic workers' associations and trade unions continue to campaign for Spain to ratify the ILO Convention 189 and Recommendation 201, on decent work for domestic workers which recognises domestic workers' entitlement to unemployment benefits.^{80, 81}

⁷⁷ Centro de Documentacion Judicial 2020

⁷⁸ Zaguirre Altuna 2019

⁷⁹ Except for mandatory old age and disability insurance benefits (régimen residual del SOVI). Source: UGT 2019

⁸⁰ ILO 2011

⁸¹ For example, UGT, Sindihogar-Sindillar, and the recently created SINTRAHOCU, Sindicato de Trabajadoras del Hogar y los Cuidados.

2

Home care digital platforms operating in Spain

The role of intermediaries

As discussed in the previous section, families in Spain mostly meet their own long-term care needs. Public resources do not reach all who need them. Families are either relying on a relative (usually a woman) to undertake the carer's role or they are employing domestic workers to do the job. In the case of the latter, families find workers mainly through informal networks and word of mouth or through intermediaries such as local authorities, non-governmental organisations and charities, cooperatives, and private companies. Some companies employ the carers themselves, and the family pays the company. However, in most cases, private companies and placement agencies act as proxies. This is because the amount paid per working hour is more expensive for the family when a company is hiring the worker than it is when they hire the worker directly.⁸² As mentioned earlier, Spain is one of the European countries with the highest number of domestic workers working under a direct employment model (domestic workers employed directly by the families).⁸³

Authorised placement agencies are public or private entities that act as employment intermediaries between job seekers and employers. They are authorised by the State Public Employment Services (SEPE) and regulated by the Royal Decree 1976/2010.⁸⁴ In the case of those specialised in the domestic work sector, the agencies act as intermediaries between the worker and the family, and the family is the employer. In some cases, the agencies also function as centres authorised to provide SAD services. According to the National Association of Placement Agencies (ANAC), there are 1,781 authorised placement agencies in Spain, 125 of which specialise in the domestic work sector.⁸⁵ Many are small and medium-sized enterprises, many of them family businesses.⁸⁶ They identify the needs of the client, undertake a selection process (CV intake, in-person interviews in offices, validation of references and qualifications) and the administrative process (contract on behalf of the employer, social security registration, monthly administration, payslips and so on).

New intermediaries in the domestic and home care sectors

Within this ecosystem of actors mediating domestic and home care work, new digital players have entered the scene over the last five years. Through our scoping exercise, we have identified several tech companies and start-ups using web or app platform technology, sometimes both, to match offer-and-demand in the domestic and home care sector in Spain.

It is possible to group these according to whether they were founded in Spain or abroad, as well as whether they specialise in home care (elderly, dependent and children), or whether they also offer other household-related services. These other services include cleaning, house maintenance, pet care, private tuition, personal training, etc.

⁸² Advancing Personal and Household Services 2019

⁸³ Farvaque 2015

⁸⁴ Ministerio de Trabajo e Inmigración 2010

⁸⁵ Asociación Nacional de Agencias de Colocación 2017

⁸⁶ Ibid.

Examples of digital platforms mediating care and domestic services in Spain

	Platforms	Examples:
National (founded in Spain with HQ in Spain)	Specialised platforms	<p>Care of the elderly and dependent: Cuideo, Aiudo, Wayalia, Cuorecare, Joyners, Cuidum, Familiados and Depencare.*</p> <p>Childcare: Nannyfy was launched in 2018. It started as an app platform specialising in childcare. In April 2020, as a result of the Covid-19 lockdown measures, the start-up transitioned to offer online classes for children.⁸⁷</p>
	<p>Multi-service platforms</p> <p>They offer household related services across more than one sector (e.g. elderly care, childcare, cleaning and maintenance, pet care, private tuition...).</p>	<p>Yocuido: App offering child and elderly care, and cleaning. Services offered on a national scale. https://yocuido.es</p> <p>Cronoshare: Web platform for carers, domestic workers, psychologists, private tuition, pet carers, personal trainers, house renovations, etc. Those offering work need to pay in pre-paid digital currency to contact the clients, i.e. those seeking the services. Services offered on a national scale. https://www.cronoshare.com/</p> <p>Clintu: Web platform for child and elderly care, home and office cleaning, removal services, household maintenance (plumbers, painters, builders, etc.). https://clintu.es/es</p>
International (founded abroad, operating in Spain)	Specialised platforms	<p>Sitly: App platform founded in the Netherlands in 2009; now present in 12 countries. Specialised in childcare. It started operating in Spain in 2016 under the name Quierocanguro. https://www.sitly.es/</p> <p>Topnanny: Web platform founded in France, specialised in childcare. https://topnanny.es/</p>
	Multi-service platforms	<p>Care.com is an app platform offering child and elderly care, pet care, household maintenance and cleaning services, private tuition classes, personal assistants and personal trainers... Founded in the United States in 2006, it is present in 16 countries and claims to be the largest online destination for finding and managing family care.⁸⁸ https://www.care.com/</p> <p>Topayuda: Founded in France. Initially specialised in childcare (topnanny), the company has now diversified and created a second platform (topayuda) to offer other household related services: gardening, DIY, home repairs and maintenance, removal assistants, elderly care, private tuition classes. https://topayuda.es/</p> <p>Yoopies: Web and mobile app platform founded in France and now present in 19 countries, offering services in child and elderly care, pet care, household cleaning, household maintenance and private tuition. https://yoopies.es/</p>

* Focus of this report.

Figure 9. Image source: Digital Future Society

⁸⁷ Garcia Martín 2020

⁸⁸ Care.com 2016

The *digital* home care sector

The *digital* home care sector is just emerging in Spain: the eight platforms specialising in elderly and dependent care were founded between 2015 and 2018. They all started as start-ups and have since scaled up to offer services in cities across Spain. They all have at least one HQ office in a mid-large size city, half of them in Catalunya: four in Barcelona, two in Valencia, one in Madrid and one in Pamplona.⁸⁹ In addition, several of them have some form of presence (offices, a coworking space, or representatives) in other cities.

Services are offered in cities across the country, although the scale varies. Cuideo, for example, the largest platform in terms of numbers of carers, offers services in 24 cities.

In terms of office staff, the largest is also Cuideo with 50 staff, and the smallest team is Depencare with five members of staff. Regarding active carers, numbers range from Depencare’s 180 to Cuideo’s 3,270. It is worth noting that the definition “active” varies across platforms meaning these figures warrant caution. Also, these figures fluctuate and not all platforms make this information public.

Digital platforms operating in home care sector in Spain

Digital placement agencies	Cuideo. Authorised placement agency. Founded in 2016, Barcelona. Offers long-term, regular and pre-programmed by the hour services and live-in care. Services available in more than 24 cities. 3,270 carers and 50 staff.
	Aiudo. Authorised placement agency. Founded in 2016, Valencia. Offers, long-term, regular and pre-programmed by the hour services and live-in care. Services available across Spain and specialises in rural areas. 250 carers and 12 staff.
	Depencare. Authorised placement agency. Founded in 2018, Madrid. Offers long-term, regular and pre-programmed by the hour services and live-in care. Offers rent of orthopaedic materials. 180 carers and 5 staff.
	Wayalia. Authorised placement agency, limited company and franchise business. Offers by the hour services in the home, hospital or care home and live-in care. Services available across Spain.
	Cuidum. Authorised placement agency. Founded in 2015, Valencia. Mobile app. Offers long-term, regular and pre-programmed by the hour services and live-in care. Has an e-commerce site on the website offering orthopaedic materials. 32 staff.
	Cuorecare. Authorised placement agency, limited company and franchise business. SAD accredited by the Community of Valencia. Founded in 2017, Barcelona. Offers childcare, elderly and dependent care services. Over 1,000 carers according to the website.
On-demand platforms	Joyners. Limited company. Founded in 2016, Barcelona. Mobile app. Offers on-demand, one-off and regular by the hour services. 1,337 validated carers and 7 staff.
	Familiados. Limited company. Founded in 2016, Pamplona. Mobile app. Offers on-demand, one-off and regular by the hour care services. 2,000 carers and 10 staff.

Figure 10. Image source: Digital Future Society.

⁸⁹ It is perhaps unsurprising that half of these platforms have been founded in Catalunya given that Barcelona is the start-up hub in Spain and one of the most important innovation hubs in southern Europe. Source: Mobile World Capital Barcelona 2019

Business models

Two very distinct business models are clear: what we call the **digital placement agencies** and the **on-demand** models. The table on page 27 provides a brief outline of each enterprise.

Digital placement agencies operate in a similar way to that of a traditional private placement agency. As seen in figure 10, they are all registered as authorised placement agencies. Wayalia and Cuorecare are also franchise businesses.

In the case of the interviewed platforms, they offer recruitment as well as ongoing, follow-up support for the duration of the service. They charge clients an initial fee which varies from 250 EUR at the lower end to 370 EUR, and a monthly fee which is around 80 EUR a month. The initial fee includes assessing the client's needs and selecting a carer, doing the legal and administrative work, such as contract signing and registering the carer in the Special System for Domestic Workers, on behalf of the family. The monthly fee covers managing payroll, finding a substitute carer during the summer holidays or sick leave, regular contact with the worker and family to follow up, and any contractual changes that might emerge.

Some platforms can find childminders upon request of existing clients, however, until recently this has been a residual part of the business. This is now changing slightly, with some platforms like Aiudo and Familiados (through its brand Familiados Kids) seeing a business opportunity in offering more childminding services as a result of the Covid-19 crisis, temporary closure of schools and cancellation of extra-curricular activities. Since interviewing for this report, Depencare has now launched its spin-off Depencare kids.⁹⁰

It is important to note that not all companies share the same operating procedures or motivations, despite sharing the digital placement agency categorisation. For instance, the BBVA Momentum programme has recognised Aiudo for its social impact ethos.⁹¹ The company also has agreements with the Red Cross and other non-profit organisations to work with carers (20% of the total) who are in a vulnerable situation, such as gender-based violence survivors, or who are in risk of social exclusion.⁹² In 98% of the cases, Aiudo successfully manages to get the families to employ under permanent contracts (as opposed to fixed-term contracts), even when only for a shorter-term service (such as a month cover during the summer holidays). Having an indefinite contract can help carers gain access to the rental market, set up a credit line or enable other purchases that would otherwise likely be out of reach with a temporary contract.

For some platforms, such as Cuideo and Depencare, selecting the carer and then formalising the working relationship they share with the family (contract and registration of the carer on the Special System for Domestic Workers) are indivisible services. In other words, these companies would not work with clients who only wish to use the platform to select a carer. In other cases, however, the platform only prepares the contract paperwork and registers the carer on the social security system upon the request of the family.⁹³ Section four of this report further discusses the platforms' potential role in the formalisation of the sector.

⁹⁰ As they explained in interviews, although they both come under care, childminding and elderly care are two very different things. The profiles of carers and childminders, as well as each of the user groups' needs, varies quite significantly.

⁹¹ BBVA Momentum, n.d.

⁹² Ros 2017

⁹³ No information on this has been found for Wayalia and Cuidum.

Furthermore, another service offered by most of these new intermediaries is the option of formalising the working relationship for families who already have a carer working informally without a contract. In these cases, the platform interviews the carer to ensure they meet the required standards and then proceeds with the administrative work of preparing the contract and registering the carer on the social security system under the Special System. Again, the family is the employer of the carer and the platform does the paperwork on their behalf.

In addition, one of the platforms interviewed also acts as service provider on behalf of the local authorities. The platform employs a small proportion of carers directly to provide services to elderly and dependent clients who qualify for state-sponsored home care under the System for the Autonomy and Care for Dependency (SAAD).

Lastly, according to the information available on its website, Cuorecare's model appears to be slightly different as it charges clients an initial fee and monthly fee, as well as a 29.90 EUR monthly fee to carers. This latter fee includes "access to an exclusive 'job shop', online tutorials and training, employability coaching, personalised attention 24/7 and conflict mediation with the family".⁹⁴

On-demand platforms in the home care sector have a model similar to other on-demand platforms in different sectors. For example, the transportation platform Uber takes a cut from the hourly rate paid to carers. Familiados takes a 14% commission and a minimum of 2 euros while Joyners charges between 10 and 35% depending on the service. Workers set their own hourly rates, with the platform establishing a minimum price of 8 euros an hour. Familiados takes payment on its website through the payment gateway Stripe. Joyners also takes payment via its website by credit or debit card, or through direct debit.

These platforms specialise in urgent, one-off, short-term services, mediated through a web platform, in the case of Familiados, or a mobile app, in the case of Joyners. Typical client needs would include someone needing a carer to accompany their elderly parent home from the hospital, someone whose regular carer cannot come at the last minute, someone whose child is sick or on school holiday while they have to work, or someone wanting to take a respite and go out for dinner with friends.

Joyners also advertises its platform for activities such as night-time care at home, in hospitals or care homes, for trips to the doctor, for daily walks or medication intake. Through the mobile app, carer and relatives can chat in real-time and keep track of the objectives and agreed services in what is called the *Plan asistencial* (care plan).⁹⁵ In the case of this platform, the response time is one hour (so within an hour a carer can be at a client's home). Services are available 24 hours a day, 365 days a year.⁹⁶ For long-term care needs, Familiados suggests customers use the app to find a worker for a few hours and then, if they are happy with them, employ them directly.⁹⁷

⁹⁴ Cuorecare 2019

⁹⁵ Joyners, n.d.a

⁹⁶ Joyners, n.d.b

⁹⁷ Familiados 2018

Founders and start-up stories

The platforms founders fit the typical profile of entrepreneurs in Spain: predominantly male, in their mid 30s, with university studies.⁹⁸ They typically come from consultancy and business/entrepreneurial backgrounds. Two also have a background in social work. None were carers or working in a traditional care placement agency before starting their business in this field although one founder has a background in physiotherapy and studies in gerontology.

Half were motivated by a personal experience, a common trait in the founding stories of start-ups across sectors. In this instance the personal experience usually involved having to find a carer for a family relative at short notice and struggling to do so. Some describe the common anecdote of looking for ads on hospital boards and thinking: “isn’t there an app for this?”.

Pain points they are addressing

Founders of these home care platforms coincide in describing the advantages of digitalising the sector, especially regarding increased agility, ease of use and peace of mind.

As for the user needs they are addressing, the founders have tapped into some very specific “pain points”. Historically, finding a carer can be a stressful process and often the end-user (dependent person) is different to the service purchaser. In other words, the service purchaser is in the so-called sandwich generation: the parents of children, in the case of childcare, and daughters and sons in the case of elderly care. As one of the interviewees said, children give a nine-month notice, but “dependency” in old age often comes unannounced.

The founders who were inspired by personal stories all shared common experiences: having to find a carer for an ageing or sick parent or relative urgently and not knowing where to find one. They described the downside of the offline sector: the time and effort involved in going through traditional agencies and informal channels, such as looking up phone numbers in ads on a hospital notice board. They emphasised the tension generated by the delay in finding someone suitable against the need of having to find someone urgently, someone trustworthy.

Depencare’s founder described the experience of having to find a carer for his elderly grandparents: “In our initial search, it was not obvious we would be able to find someone to take care of them with all the guarantees and especially with the peace of mind, not only for the person taken care of, but also for the relatives who are not there”. This, coupled with his previous experience in strategic consultancy, inspired him to found the platform. “This is a very delicate thing” he adds, the job “has to be done by people who are validated, cross-referenced, with experience and so on”.

⁹⁸ Hinchliffe 2018

And even when the entrepreneurs managed to secure a suitable carer, they would scramble again to locate an alternative solution during the carer's holiday or sick leave.

The platform websites and marketing materials claim to offer potential clients an easy, agile, hassle-free and paperless process available in the comfort of the client's home, tailor-made to the client's needs, and above all, of high quality and safe.

The importance of trust

Trust is a crucial component in home care work. While the rhetoric around agile matching processes resembles the narrative of platforms in other sectors, the issue of trust marks a vital difference with the dynamics and characteristics found in other sectors such as delivery or transport.

Due to the nature of the job, care for young and elderly relatives is fraught with fear around the risks of seeking services from strangers online or off the street.⁹⁹ In this sense, most of the platform websites make references to how they work with the best professionals, their rigorous selection process and the low proportion of applicants that make it through successfully.

The Cuidum website is a useful illustration of this. It says: "When we are looking for a carer, it is very common for us to be recommended someone's relative who is simply 'looking for work'. Very often, the family welcomes a carer into the home without really knowing the true identity of that person. At Cuidum we know whom the person going to be employed is: we have copies of their identity papers, we have checked their training certifications and experience references [...] Only 23% of the candidates pass our admission tests, which makes the family feel secure and more trusting of the person they are letting into their home."¹⁰⁰

Trust and safety are also issues of concern for workers, although this receives a lot less attention. Usually, the amount of information required prior to starting a service is more extensive in the case of the worker than the client.

⁹⁹ Ticona and Mateescu 2018

¹⁰⁰ Cuidum, n.d.

3

Operations: services offered, recruitment, carer profile

Depending on whether the platforms have an on-demand or a digital placement agency business model, there are variations in the services offered, worker profiles and the matching process.

Services offered

The services offered via the platforms address a broad spectrum of needs, a reflection of the variety of needs an elderly person could have, over time. At one end of the spectrum, a person might only need ad-hoc support to do some daily activities, such as getting in and out of a car, or support with shopping and cooking. At the other are people with multiple chronic pathologies who require 24/7 care. In interviews, founders would describe how this is often a continuum – people start off needing support just a few hours a week and then over time, they progressively require more and more specialised care.

The digital placement platforms tend to focus on long-term care and pre-arranged regular services. On average, 50% of their demand is for live-in carers. Whereas the on-demand models specialise in one-off, ad-hoc, short, by the hour services and they do not offer live-in care options.

One-off, short, urgent services	Regular mid-long term services (urgent or not)
Joyners	Depencare
Familiados	Aiudo
	Cuideo

Figure 11. Services offered. Image source: Digital Future Society

All platforms concentrate on mid to large cities with only one of the interviewees explicitly mentioning offering services in remote, rural areas.

Agile services

The founders highlight the speed at which client and carer can be matched as a major advantage brought upon by these new digital players. In the traditional offline market, the interviewees said it could take on average ten days. In the new digital sector, one can, on average, find a carer in less than 24 or 48 hours through the digital placement platforms and in less than an hour through the on-demand platforms.

Carer profiles

On average, almost 90% of carers working through the digital placement agencies are women, and nearly 70% are foreigners with the vast majority from Latin America, and a small minority from eastern Europe. In contrast, only 20% of carers seeking work through Familiados, and 50% in the case of Joyners, are foreigners.

The fact that live-in care, vastly undertaken by foreign women, is not offered through these on-demand apps explains the lower numbers of foreign women finding work on this type of platform. Historically, live-in care has been seen as a way into the sector and the local labour market for those newly arrived in the country.¹⁰¹ The digital home care sector would appear to mirror this, but not all founders were able to provide exact figures.

Carers seeking work through the on-demand platforms would tend to have higher levels of education and training, according to the interviews. Familiados explicitly markets their platform to both carers and health professionals, describing it as “the ideal job for nurses, assistant nurses and dependent care specialists”.¹⁰²

Entry requirements

The platforms require carers to have between one and three years of demonstrable experience and past references, and some mention official health and social care qualifications. Platforms highlight on their websites and stressed during the interviews how much attention they give to validating profiles and how rigorous the process is. They reportedly accept relatively low percentages of potential carers onto the platforms: the average is around 15%.

The level of information available on requirements regarding education and vocational training varies across platforms. Some said that all their workers have health and social care training but when pressed for further details, information was vague. By law, domestic workers are not required to have any specific formal qualifications.

Both of the on-demand platforms said they worked with professionals with health and social care qualifications. Joyners, for instance, claims it only intermediates services between qualified professionals from the health and social care sectors (for example, nurses, assistant nurses, social workers, etc.).

Intensity of work on the platform

Another factor that varies depending on the business model is the frequency and number of hours carers spend in work found through the platform.

The founders of the digital placement agencies mentioned how they try to fill in as much of the carer’s working week as possible, preferably with the same clients, and if that is not possible, with multiple services. There was a special mention of the importance of programming services and regular schedules.

¹⁰¹ Martínez Bujan 2011

¹⁰² Familiados 2020a

“What we try to do is to fill up their schedule so they are no longer in a ‘mini-job’ situation and so they have a job that helps them have some stability. So, the closer we get to the 40-hour week, the better”. (Aiudo)

Regular schedules and prioritising services of a minimum number of hours a day, and a minimum days a week is seen as beneficial for all parties – it benefits the worker, and it benefits the platform and clients by encouraging loyalty from carers and minimising rotation and the chance of losing workers to another platform. In sum, these platforms focus on long-term care and therefore, long-term carer-client relationships.

The on-demand platforms are quite different. The carers tend to be qualified social or health care professionals who use the platforms to earn some extra income rather than looking for a full-time workload. Many have a regular part-time job in a care home or hospital, working shifts or alternating “long and short” weeks, the companies’ founders explained. So, it is not uncommon for instance, to find an emergency room nurse offering her services for a few hours through one of the platforms. Hourly rates also reflect the higher qualifications.

“My schedule at the hospital changes every month and I only have a part time job. With Familiados I can complete my salary. It’s very good!” (nurse, Familiados website)¹⁰³

“Our platform is creating new entry opportunities for health and social care professionals to capitalise their free time without going through the domestic worker circuit.” (Joyners)¹⁰⁴

The fact that highly qualified professionals are seeking work through on-demand platforms raises the question as to whether on-demand platform work is, in a way, filling a void left by the chronic shortage of full time, stable jobs in the public social and health care systems.¹⁰⁵ It is an important question to be explored in any future studies on the motivations and circumstances of professionals engaging in platform work in the home care sector.

Automating processes and use of algorithms

One of the key differences between the new digital actors and traditional agencies is the automation of what have historically been intensely manual processes. It is the difference, as one founder put it, between having “a pile of CVs” and a database.

“Human resources, and the selection and hiring of carers under the Special System of Domestic Workers, has always been done manually or through a process highly dependent on the phone. From the start, we were always clear that we didn’t want to be a call centre, nor a team of administrators. This is why we developed a software specialised in the selection and management of carers. All the bureaucratic procedures are done through the platform (families

¹⁰³ Familiados 2020b

¹⁰⁴ Bolsamania 2017

¹⁰⁵ The Organización Médica Colegial (Medical Association) has repeatedly denounced the precarious employment in the public health system, the “public health system is the largest temping agency in the country” and it is like “working for McDonalds”. Source: Daniele 2017

don't have to leave their home, all they need is a mobile phone) and it allows us to consider each candidate individually and on a case-by-case basis through the video call tools and online psychological tests.” (Aiudo)¹⁰⁶

Potential carers must invest a considerable amount of time online, filling out templates and uploading documentation such as certificates and proof they can legally work in Spain. They also need to provide contact details for references. In some cases, they also have to record themselves on video or build an online profile with a picture. Some platforms require carers complete online personality and psychological tests, and all digital placement agencies mentioned they interview (mostly virtually) those who have completed all the previous steps.

The process of identifying the needs of clients was something all the digital placement agencies highlighted. Although much of the process is automated, human input still has a place in the client's needs assessment and the interaction between a platform member of staff and the client.

“Despite being a digital model, I think that when it comes to home care, the human side cannot be lost. It cannot be lost now nor in thirty years' time.” (Depencare)

All platforms use algorithms in the process of matching clients with a suitable carer and some platforms work with dozens of variables. However, all of the digital placement agencies interviewed emphasised the importance of having a person check the matching done by the algorithms. This marks a clear difference with the modus operandi of platforms in the delivery and transport sectors. For on-demand platforms in the care sector, however, the process is fully algorithmic like that of Glovo or Uber.

“We need to be careful with algorithms. Because in the digital economy a lot is said about algorithms and I think algorithms help but they are not always the answer.” (Depencare)

One of the on-demand platforms also mentioned how algorithms reward those who are most active on the platform by sending them more job offers.

Some platforms select the worker themselves or they might highlight three candidates. In the case of the on-demand platforms, the algorithm generates one suggested candidate and three alternatives, and the system facilitates the profiles and photos for the clients to make the final call.

Technology and care

The role of technology in care, including, for example, the role of robots in care at home and hospitals, is a growing debate in the academic world.¹⁰⁷

The key difference between the digital placement agencies model and traditional players in this sector is the use of digital technologies to automate and digitalise their processes.

¹⁰⁶ Jimeno 2020

¹⁰⁷ Vallès-Peris and Domènech 2020

Across the board, the platforms interviewed are at different stages of further developing the technology used, beyond recruitment, in the day-to-day follow-up of services. For example, through the development of apps used during the service. Although how far they can go is a sensitive issue as regulators could see this as signs of employment.

The connection between technology and quality care is made obvious on Cuorecare's website where one of the page headings reads: "we professionalise care in the home. Technology and heart to offer trustworthy, safe care."

Cuorecare is an example of a platform that has developed (prior to the Covid-19 pandemic) technology for the daily follow-up of services. Cuorecare has developed what they call the "Cuorecare method" which revolves around a daily programme of activities set by a Cuorecare doctor, for the carer to do with the client. These include activities such as physical stimulation through yoga, personalised nutrition plans, medication administration, etc. The carers check the different activities as they go along and the relatives can, in real-time, follow the activities undertaken by their loved ones and chat with the carers. They also receive a daily report through the platform. Furthermore, both carers and relatives can, through the platform, ask advice from Cuorecare's medical doctors and psychologists.

Such systems could be an effective method for tracking and regulating working time and tasks, a key challenge found in ensuring decent working conditions for domestic workers.

Platforms in the care sector: the new Uber?

The El Mundo newspaper described Joyners in 2016 as “an Uber of social workers for the third age”.¹⁰⁸ And the Catalan newspaper, Ara, draws the comparison with the taxi sector: “The platform groups professional assistants and offers them on demand so that as if they were a taxi, they can be booked through a mobile app.”¹⁰⁹ This text appears in an article titled Joyners Becomes a Fleet of Elderly Carers. These are only a few of the examples of media reports drawing links between the care and delivery and taxi sectors, and referring to platforms as the new Uber or Glovo.

When asked, during interviews for this report, about their opinion on the use of the term “uberisation” to describe the emergence of tech-based enterprises in the home care sector working with mobile and web applications, such as their own, the founders’ responses fell into two clear positions.

The founders of the digital placement agencies were against their falling under the label of “the uber of the care sector” or their activities as “uberisation”. They saw it as “unfair” and made a clear distinction between their model and that of the on-demand platforms where workers are independent contractors and not contracted by the families, and where services are ad-hoc, short-term and not tailor-made to meet client needs. They mentioned how the use of the term uberisation is unhelpful when talking about a sector which is so different to the taxi sector, and how the different platform models emerging in care cannot and should not fall under the same umbrella term.

In contrast, the two on-demand platforms interviewed explicitly described themselves as the Uber or the Glovo of the care sector. Familiados emphasised it was a “true” platform: “We are Uber. On our website there is no phone number because we don’t want you to call us by phone. We want you to be able to find everything you need conveniently on our app or website. We want you to do all transactions through the [online classifieds] website”.

Joyners described itself as “a marketplace version 3.0. The version 1.0 is the handwritten note on display in the supermarket. The marketplace 2.0 is the [online classifieds] website.”

Joyners insisted it did not “place” but that it was a digital intermediary that mediates between qualified, liberal professionals and families who require certain services.

Meanwhile, Wayalia describes its app as one that “will manage to make all our services much more accessible (carers, nurses, physiotherapists, etc.) and will turn us into the ‘Glovo of care services’ for the elderly”.¹¹⁰

¹⁰⁸ Clemente 2016

¹⁰⁹ Manresa 2016

¹¹⁰ Los Argonautas 2018

4

On professionalisation and formalisation: just rhetoric?

Social good mission

The platforms present a social good mission discourse that focuses on their role in modernising, professionalising and formalising the sector. They do so on their website, in media interviews, and they also did so in the interviews they gave for this report. In the case of the digital placement platforms, they also emphasise their role in educating the market and in watching out for workers' interests in the face of abusive clients, especially in the live-in situations. This mirrors the discourse of digital platforms entering the care sector in other countries such as India, the United States and Kenya.^{111, 112, 113, 114, 115} This is also expressed by placement agencies in the traditional offline economy.

The section below discusses these points about professionalisation and formalisation further. While professionalisation and formalisation might represent very legitimate ambitions, both are important concepts that merit closer attention.

On professionalisation

The construction of an activity as a profession is a complex, non-neutral phenomenon. Key elements of professionalisation include training and skillsets, and official certification and recognition of skills development. Three other important factors are standards, ethics codes, and workers' associations that oversee and protect the entry barriers. Hierarchies and social status also mark professions.

Familiar examples of well-established professions include the world of medicine with doctors having to complete regulated training to achieve certification and abide by a code of ethics. Many belong to medical associations, membership organisations that advocate on behalf of the medical professionals.

Several factors including gender, class and race have determined how, when and which activities have become professionalised over the years. Some authors link the emergence of professional projects to the development of modern society and the welfare state in the late 19th and early 20th centuries.¹¹⁶ "They defend how the emergence of the concept of profession responds to the aspirations of white middle-upper class men with an ambition to ascend the social ladder."¹¹⁷ Occupations are to this day highly segregated by gender, and labour laws and policies have historically focused only on paid employment undertaken in the public space.¹¹⁸ The process of professionalising different activities and the construction of professional identities largely left aside the care of people. Care has long been considered the unpaid responsibility of women in the private sphere of the home, rather than a paid

¹¹¹ Ticona and Mateescu 2018

¹¹² Hunt and Machingura 2016

¹¹³ Mewa 2020

¹¹⁴ Interview with Emma Hamman (ODI)

¹¹⁵ Interview with Aayush Rathi (CIS India)

¹¹⁶ Recio Cáceres et al. 2015

¹¹⁷ Ibid.

¹¹⁸ Rodríguez Fernández 2013

employment and profession in its own right.¹¹⁹ The exception to this is the case of nursing, built as an independent occupation for middle-class women in the mid-19th Century. Nurses have traditionally been perceived socially as *the* carers of the prestigious field of medicine.¹²⁰

Obstacles to professionalising home care in Spain

Past attempts at trying to professionalise care work in Spain have faced some challenges. To begin with, cultural factors and specifically, the social imagery of care, represent an obstacle to professionalisation.¹²¹ To date, the ideal of care is “at home with the family as the main caregiver”.¹²² This opinion is shared widely by elderly and dependents themselves, family members, care professionals and institutions.¹²³ The vast majority of elderly people want to be cared for at home, with the institution seen as a last resort. The home is perceived to be a place where care can be individualised to a greater extent than in institutions. This is because institutions see carers tied to tight schedules and with little autonomy to decide how much time they spend with each patient.¹²⁴ Unfortunately, however, the organisation of labour and construction of a profession are often connected with the institutionalisation of an activity. Ironically then, it is the central role of the home that helps perpetuate the image of care work as something pertaining to the private sphere and thus lacking in social value and professional status.¹²⁵

Beyond the reproduction of the social imagery around care, a second set of obstacles are administrative and structural. Labour inspections are difficult to carry out in the context of home care, given the private nature of the workplace. Also, as mentioned above, Spain has made a significant attempt at professionalising home care work through the LAPAD law. However, a lack of financial investment over time and the over-reliance on economic benefits for family caregivers further hinders attempts at building a professional labour force.

Additionally, developing hard skills is a requisite of professionalising an activity. Whereas in inter-personal work, such as care work, very often what counts are soft skills and trust, two elements which are not so easy to capture with formal training and certificates.¹²⁶ Furthermore, long-term care in Spain is “naturalised as a female responsibility more closely related to identity and a way of being than to a set of learned skills and competences”.¹²⁷ The result is

¹¹⁹ Moreno-Colom et al. 2016

¹²⁰ From 1905: “Nursing is distinctly woman’s work... Women are peculiarly fitted for the onerous task of patiently and skilfully caring for the patient in faithful obedience to the physician’s orders. Ability of care for the helpless is woman’s distinctive nature. Nursing is mothering. Grownup folks when very sick are all babies” (Hospital 8 July 1905: 237) quoted in “The Body and Doing Gender: The Relations Between Doctors and Nurses in Hospital Work. Source: Davies 2003

¹²¹ Moreno-Colom et al. 2016

¹²² Ibid.

¹²³ Ibid.

¹²⁴ Recio Cáceres et al. 2015

¹²⁵ It must be noted that this is common to other Mediterranean countries but not so in Nordic countries, for instance, which have different social care models, residential homes centred around the person and different family and dynamics compared to those found in southern Europe.

¹²⁶ Interview with Claire Hobden (ILO)

¹²⁷ Moreno-Colom et al. 2016

that the “profession knowledge associated with the job is not valued”.¹²⁸ Also, as discussed above, under the LAPAD law, all professional carers have until 2022 to certify their skills and experience. This date has been pushed back three times as many working as professional carers started doing so without any certifications.

Finally, a fourth major obstacle to professionalising home care is structural and related to the precarious working conditions characteristic of the sector. Domestic workers and especially live-in carers represent one of the most vulnerable collectives. Many work in irregular and precarious working conditions, making it difficult to organise collectively as a social agent.

The role of platforms in professionalising the sector

Common to several of the platforms interviewed was their ambition to professionalise the sector, yet there was little consensus on the meaning of professionalisation or how to make it happen. When asked to provide their definition of a professional carer, answers were vague with little agreement across the interviewees. Although, on several occasions the founders expressed having a contract as a defining factor. This blurs the two concepts of professionalisation and formalisation.

While showing an intention to professionalise the sector, when asked whether they provided training, they were quick to say that the carers accepted on the platform are all “already” professional carers with at least three years’ experience. In regards to the training required by the platform and the carers’ education levels, some of the answers were somewhat vague. In addition, none of the platforms certify or systematically endorse the experience or skills after a certain amount of time on the platform. However, two of them liked the idea when asked about it in the interview and said they would take note of it.

Platforms claim they have rigorous entry requirements as illustrated by their emphasis on only taking a small percentage (in one case as little as seven percent) of applicants. One could argue that the extensive forms that the workers have to complete, and psychological tests etc. contributes to some form of professionalisation. On the other hand, this also raises questions regarding the power and role platforms have, as new actors in this sector, both in establishing standards and defining narratives around what it means to be a professional carer, and how this might impact other non-platformised areas of the sector.

On formalisation

As mentioned earlier, one of the most pressing problems in the care sector is the high degree of informality, low pay and precarious working conditions. The new digital actors entering the home care scene in Spain are on a mission to help formalise the sector or, as one founder put it in Spanish “desprecarizar” it.

¹²⁸ Moreno-Colom et al. 2016

Like professionalisation, the concept of formality needs some unpicking to be able to assess the extent to which these new players can potentially effectively support it. For this, the ILO provides a useful reference. According to the ILO, informality or formality, and the transition from one to another is a continuum:

“In the domestic work sector, the informality extreme of the continuum is represented by the absence of employee status and lack of any minimum rights and entitlements, such as social security and paid annual leave. At the other extreme is absolute formality in terms of social security access and registration, public registration of the employment contract, and written employment records (such as contracts or pay slips). In between these poles are found the varying forms and degrees of informality or formality.”¹²⁹

The good intentions of intermediaries alone are not enough to formalise a sector. Social-economic policies, and labour and social security laws are two elements that, combined with the work of intermediaries, influence the extent to which workers’ relationship is formal.¹³⁰

In Spain, the domestic worker regulation brought into effect in 2011 received wide criticism. The high contractual costs mean many families cannot afford these services. Women are particularly affected by this. Increasing numbers of women have entered paid employment and are no longer able to care for their relatives, while at the same time, men have not taken up their full share of the caring responsibility and the women cannot afford to pay other women to fulfil the care role for them. Often these women find themselves, if care costs are too high, giving up their work or reducing their hours to again take up the care responsibilities at home.¹³¹ Another criticism made of the 2011 regulation was the bureaucracy involved.¹³² A family must act like a business by doing the paperwork, payslips, social security contributions, etc.

Regarding the role of platforms in the Spanish home care sector, it would seem the digital placement model helps formalise jobs that might otherwise have remained in the underground economy, similar to how some traditional placement agencies do. It does so by offering a joint service of matching *and* doing the contractual paperwork and social security registration, in such a way that it is not possible to do one without the other. However, the carers in this case are still employed as domestic workers, under the Special System, rather than as professional carers under the General Regime. Again, the only way for a family to legally employ a live-in carer is under the Special System for Domestic Workers, as the General Regime, with its 40-hour working week, does not allow for it. In effect, the existing employment laws perpetuate the employment of domestic workers to undertake live-in care roles.

Whereas the on-demand platforms do not appear to be contributing to the formalisation of home care services as they are limited to only offering the service of matching clients and workers. At present, those working through on-demand platforms have no way of paying contributions to the social security for the hours worked, and those hours are, in that sense “invisible”.

To date, the social security system allows for working as an employee at the same time as

¹²⁹ ILO 2016

¹³⁰ Fudge and Hobden 2018

¹³¹ Interview with Luz Rodríguez Fernández

¹³² Ibid.

working as an independent contractor elsewhere. It is also possible to work as an independent contractor in multiple professional activities at the same time. However, something the current social security system does not allow for is the possibility to pay contributions for the real hours worked and income earned. Instead, there is a minimum threshold of hours and income for which contributions are made. It is important to note this is a disincentive to formal employment as it discourages the declaration and paying of social security contributions for the types of ad-hoc jobs that often characterise household services (private tuition classes, childcare, cleaning and also home care) whether intermediaries are involved or not.¹³³

Were it possible to remove the thresholds, change the incentives and declare the real hours worked, not only would social security contributions increase but all worked hours would be traced. Traceability is a key element of formalisation. On-demand platforms interviewed for this report expressed support for making the social security system more flexible to allow for the payment of ad hoc hours.

Formality and working conditions

In the case of Spain, as discussed above, there is still some way to go for the law to ensure home care workers have the same rights and working conditions as other employees.

As stated throughout this report, one of the most pressing problems in the care sector is the high degree of informality, low pay and precarious working conditions. In addition, it is also worth noting that a job may be formal in the sense that there is a contract signed between employer and employee with social security contributions paid correctly, while working conditions remain poor.¹³⁴ Thus, even when formalised through a contract, live-in care work involves conditions often criticised by trade unions, domestic workers' associations and other actors. One of the items criticised is the inclusion of in-kind income (food and lodging) and the ambiguity of the "time of presence" term that refers to the time the carer is present in the household, outside working hours and without performing work, but available on demand.

The on-demand platform founders were very vocal in criticising the conditions under which live-in carers work, comparing it with quasi-slavery. The digital placement agencies that do mediate placements for live-in carers emphasised their role in mediating conflicts arising in live-in care where clients do not, for instance, respect the daily hours of rest enshrined in the law. Further research, including carer interviews, could show just how much of this mediation on behalf of carers takes place in practice.

The goal of decent work

One of the goals of the ILO's Recommendation No. 204, adopted in 2015, concerning the Transition from the Informal to the Formal Economy is to promote sustainable decent work, a concept coined by the organisation in 1999.¹³⁵

¹³³ Rodriguez Fernández 2020

¹³⁵ ILO 2015

¹³⁴ Fudge and Hobden 2018

“Decent work involves opportunities for work that is productive and delivers a fair income, security in the workplace and social protection for families, better prospects for personal development and social integration, freedom for people to express their concerns, organise and participate in the decisions that affect their lives and equality of opportunity and treatment for all women and men.”¹³⁶

So, given that a greater formality would not in itself automatically lead to better working conditions, the question for the new actors mediating work in the care sector is: how can they play a positive role in both formalising the sector and in promoting sustainable decent work?

Although it is beyond the scope of this report to delve deeply into answering this question, it is possible to make initial reflections on wages and collective negotiation.

On wages

Historically, the care sector has been characterised by low wages. Having more qualified professionals does not necessarily mean clients will be willing or able to pay more for their services. In 2019, the government increased the minimum wage (minimum interprofessional salary). As to whether this was the cause of reduced numbers of carers registered with the social security system as domestic workers in the in the following months is a cause for debate. The Ministry of Employment says the rise in the minimum salary has not resulted in reduced employment and is not the cause for the shift in numbers from declared to undeclared work for thousands of carers.¹³⁷ At the same time, in declarations to the media, the ministry has also acknowledged the difficulties inherent in undertaking labour inspections in the case of domestic work, given the inviolability of the home under the Spanish constitution.¹³⁸

When it comes to platform work, in most cases it is the families who employ home carers, and so it is the family who is responsible for setting the price. Although the platforms cannot set the price as they are not the employer, they can decide to not work with a client who does not accept their recommended price, even if what they offer is above the minimum threshold.

In some countries such as Uruguay, which has made significant advances in bringing domestic workers’ working conditions on a par with the rest of the labour force, there are collective agreements for domestic workers.¹³⁹ This is not the case in Spain where there are collective agreements (albeit with very low salaries) for the socio-health sector but none for domestic workers employed by families. This is something the platform would not be able to impact given that they are not in the role of employer, which is important for the purposes of the collective negotiation.¹⁴⁰

¹³⁶ ILO, n.d.

¹³⁷ Olías 2019

¹³⁸ Ibid.

¹³⁹ Batthyány 2012

¹⁴⁰ Ministerio de Trabajo y Economía Social 2019

On collective action

Historically, collective action has been a driving force behind both the professionalisation and formalisation of work. The issue of collective action in the increasingly digitalised labour market is a recurring theme in the literature on platform work.¹⁴¹ Some critics point the finger at how the inherent design of platforms individualises the worker and prevents the construction of a community.¹⁴² Others show how, even when this is the case, workers find subversive ways of overcoming the obstacles and establish networks with other fellow platform workers. Mary Gray and Siddharth Suri, for instance, record this exhaustively in their book *Ghost Work*.¹⁴³

In the offline economy in Spain, there are already strong grassroots movements and associations at local and regional levels. One of them is the *Mujeres Migrantes Diversas* (Diverse Migrant Women Association), created in Barcelona by domestic workers and home carers from Honduras. An association “by carers, for carers”, it is part of the *Taula de Defensa dels Drets de les Treballadores de la Llar, la Neteja i les cures de Catalunya* (Committee for the defense of the Rights of domestic workers, cleaners and carers of Catalunya), which is supported by both majority trade unions UGT and CCOO. Moreover, there has been a very vocal campaign over recent years for Spain to ratify UN Convention 189. This campaign includes the Diverse Migrant Women Association, the trade unions, the association *Sindihogar-Sindillar*, and the recently created *Sindicato de Trabajadoras del Hogar y los Cuidados* (SINTRAHOCU, Domestic and Care workers union), among other actors.

So, what role could the new digital players have in encouraging the building of communities and collective action amongst home carers in Spain? An example worth mentioning here is Danish trade union 3F, which in 2018 signed a collective bargaining agreement with Hilfr.dk, a platform providing domestic work services in private households.¹⁴⁴ The agreement has been pioneering in debunking myths around platform work and collective negotiation.¹⁴⁵ The union and platform agreed to introduce a new category of worker, with employment status, in parallel with the existing freelance arrangements. “Freelancers can apply to become employees of the platform and be covered by the collective agreement. After 100 hours of work, workers will be considered to be employees covered by the collective agreement, unless they actively opt-out from this status.”¹⁴⁶

¹⁴¹ Rodríguez Fernández 2018

¹⁴² Choudary 2018

¹⁴³ Gray and Suri 2019

¹⁴⁴ De Stefano 2018

¹⁴⁵ Countouris and De Stefano 2020

¹⁴⁶ De Stefano 2018

5

The invisibility of the sector in literature on the platform economy

To date, there is no systematic review of the home care platform sector in the literature.¹⁴⁷ In Spain and internationally, the public debate on platform work largely fails to address this sector. As the Digital Future Society report *Platform Work in Spain: What Do We Know?*¹⁴⁸ illustrates, academic research and policy debates on the platform economy in Spain heavily focus on the delivery and transport sectors, two highly masculinised sectors. Other types of platform work, such as online platform work, or platforms operating in highly feminised sectors like home care, are heavily understudied, as are the gender dimensions of platform labour.^{149, 150}

“The risk of invisibility that goes with platform work can be magnified if it is added to the invisibility-risk accompanying domestic work – the shortage of studies and initiatives focusing on the intersection of these phenomena shows how urgent it is for scholars, social partners and policymakers to tackle this issue.”¹⁵¹

This is not something limited to Spain. As the Overseas Development Institute highlights, there is a “dearth of research” on platform work emerging in this field.¹⁵² Academic literature largely focusses on the global north, paying little attention to the evolution of platform work in the domestic work sector in developing economies.

The Data and Society Research Institute points at “a gendered bias in both scholarship and public attention about on-demand labour, as male-dominated Uber has become metonymic of this economic sector to the neglect of the larger, but less controversial, care work platforms where women make up the vast majority of the workforce”.¹⁵³ In 2014, Uber had 160,000 registered workers compared with Care.com, which had 5.3 million workers with profiles on their platform that same year.¹⁵⁴

Platforms and the care sector in other countries

The use of digital platforms to provide domestic workers, including carers, is a growing trend in the United States, Europe, the Middle East and more recently, in India, Mexico and South Africa. While absolute numbers are still small compared to the overall workforce, there are already concerns regarding the impact of this new phenomenon, especially regarding the common practice of classifying workers as independent contractors.¹⁵⁵

The **European Economic and Social Committee’s** (EESC) report, *Towards the “Uber-isation” of Care? Platform Work in the Sector of Longterm Home care and its Implications for Workers’ rights*, offers a theoretical discussion on the potential benefits and challenges of platform-mediated work in Europe, especially in regard to recruitment and dismissal, social protection, remuneration, working conditions and health and safety.¹⁵⁶ The report provides three case studies of home care platforms. These are Equal Care Co-op in the UK, Home Care Direct in Ireland and Curadifes in Austria. The report includes policy recommendations in the conclusion.

¹⁴⁷ Trojansky 2020

¹⁴⁸ Digital Future Society 2020

¹⁴⁹ Ibid.

¹⁵⁰ Barzilay and Ben-David 2017

¹⁵¹ De Stefano 2018

¹⁵² Hunt and Machingura 2016

¹⁵³ Ticona and Mateescu 2018

¹⁵⁴ Ibid.

¹⁵⁵ Addati et al. 2018

¹⁵⁶ Trojansky 2020

Beyond the EESC's report on long-term home care, three other pieces of research on the wider sector of domestic work in the United States and global south countries (Mexico, South Africa, Kenya and India) are worth highlighting here.

One is **Data and Society's** report *Trusted Strangers: Carework Platforms' Cultural Entrepreneurship in the On-Demand Economy*. The report provides what it claims to be the first empirical study on platforms that mediate care work (specifically childcare) including Care.com, UrbanSitter and SitterCity in the US.

Like in Spain, the entry of women into the labour force and the rising lifespan has resulted in an expansion in child, elderly and dependent care. Careworkers and health paraprofessionals are among the fastest-growing occupations in the US.¹⁵⁷ Informal working arrangements are widespread, and the workforce is dominated by immigrant women (between 35 and 47% are living without legal documentation). Care.com, launched in 2006, has been described as "Amazon for caregivers", and in 2017 the site had more than 9.2 million registered worker profiles. All three platforms studied by Data and Society have an on-demand care model where the workers are independent contractors.

The **Overseas Development Institute** report *A Good Gig* explores the rise of on-demand domestic work in the global south.¹⁵⁸ The report uses primary data from South Africa and secondary data from other countries including Mexico, Kenya and India, where in 2016 on-demand domestic work companies were reportedly expanding up to 60% month on month.¹⁵⁹ The South Africa case study focusses on two cleaning platforms: Domestly and SweepSouth. Like the platforms researched by Data and Society in the US, Domestly and SweepSouth also have an on-demand model with independent contractors.

The research found several potential benefits to workers where domestic work remains highly unregulated and informal. These benefits include the ability to track time and earnings, set personal hourly rates, and the opportunity to overcome digital and financial divides as a result of companies providing bank accounts or facilitating low-tech access.

However, the research also points at a number of challenges. In countries with advanced regulatory frameworks such as South Africa, the rise of on-demand domestic work risks undermining progress towards the goal of decent domestic work. The researchers found an erosion of established labour and social protections as a result of the independent contractor status of workers.

Finally, in India, the **Centre for Internet and Society** (CIS) mapped 50 domestic work platforms operating in major Indian cities.¹⁶⁰ CIS identified three business models: marketplace platforms, digital placement agencies and on-demand platforms. The study explores "the ways in which structural inequalities, such as those of gender and class, are being reproduced or challenged by digital platforms".¹⁶¹ CIS conducted interviews with workers, companies, government representatives and domestic worker organisations in Delhi and Bangalore. Most of the 50 platforms identified by CIS classify their workers as independent contractors.

¹⁵⁷ Ticona and Mateescu 2018

¹⁶⁰ Rathi 2019

¹⁵⁸ Hunt and Machingura 2016

¹⁶¹ Mewa 2020

¹⁵⁹ Ibid.

All three pieces of research address the issue of visibility. On platforms where workers' profiles are visible to customers, existing forms of inequality found in hiring processes in the offline economy could be exacerbated.¹⁶² In the case of some platforms in India, for example, caste and religion could become filtering factors for workers.¹⁶³ Rating systems could reflect or, when visible to other customers, amplify biases.¹⁶⁴ The Data and Society study in the US has found that cases when clients choose according to photographs and profiles perpetuate discrimination and stereotypes.

Common themes with Spain

Domestic work covers a range of activities and there is a need for caution when comparing cleaning services with home care of the elderly, or with childcare. The same is true when drawing comparisons of platform work across different countries and global regions.

That said, independently of the business models, a number of common themes arise across Data & Society, ODI's, CIS' and Digital Future Society's own research. These are:

- **Social good mission.** Platforms share a common ambition of formalising the sector and professionalising home care, however, there is a lack of consensus on what professionalisation means or entails or how to address and provide up-skilling and training.
- **Value they bring to workers by dealing with traditional power asymmetries.** Platforms make references to the abuse some live-in carers experience and highlight the value of having the platform as an intermediary to educate the families about the workers' rights and intervene in conflict mediation.
- **Services are advertised as high quality and delivered by expert professionals.** Being able to advertise trustworthy professionals who deliver quality services is of paramount importance for platforms in the care sector. This applies to platforms operating in other countries too, such as for example the US, India or Kenya.^{165, 166} Some, not all, construct narratives around informal channels as being risky.
- **Platforms set standards by establishing entry requirements,** especially concerning years of experience and qualifications. Platforms make public how relatively small percentages of carers get through their selection or profile-validation process.
- **Feedback, review and rating systems are usually one-way.** Clients are systematically encouraged to review the carer. However, although carers might be able to provide feedback, they are generally not asked to review the client by default.

¹⁶² Ticona and Mateescu 2018

¹⁶³ Mewa 2020

¹⁶⁴ Ticona and Mateescu 2018

¹⁶⁵ Hunt and Machingura 2016

¹⁶⁶ Mewa 2020

- **Female imagery is used on platforms mediating childcare, cleaning and elderly care.** The carers in website images and promotional materials are overwhelmingly female. The Spanish platforms generally use the feminine noun *cuidadoras* (carers). Exceptionally, the Cuideo platform openly addresses the issue of gender in the care sector through its blog post titled 2018 resolution: STOP Gender Discrimination in Home Care Sector.¹⁶⁷ The article exposes how clients often ask for a female carer, and it questions the social stereotypes constructed around men and women's caring capabilities and skills. The platform's 2018 new year resolution, the article reads, is to promote gender equality in the sector and end gender discrimination. It does not provide any further details on how it aims to address these issues.

The themes discussed above are not exclusive to platforms and some also apply to some traditional placement agencies.

¹⁶⁷ Cuideo 2018

Conclusion

The home care sector in Spain has grown exponentially in recent years. During the 1980s and 1990s, there was a mass entry of women into paid employment. This, together with an expansion of care needs due to the increasingly older population, the limited advances made in men's uptake of care responsibilities in the home, and the fragility and under-resourced social care system, have, combined with other factors, resulted in the present day social-care crisis.

The LAPAD law introduced in 2006 did mark an advance with the universal recognition of the right to care. Unfortunately, subsequent funding cuts have affected the law's implementation and there continues to be a widening gap between the demand and offer of care services. This has become strikingly obvious during the Covid-19 pandemic with families, and especially the women in the families, having to provide the care themselves. Female relatives either do the caring themselves or employ someone else – usually another woman – to do the job.

Within this context, over the last few years, new intermediaries have entered the scene, both in Spain and abroad. Advances in digital technologies and high penetration rates of communication and information technologies are facilitating the expansion of digital platforms across sectors, and home care is no exception. Yet this highly feminised and precarious sector is largely absent in the platform work literature in Spain and elsewhere. This report aims to be a first step in addressing this gap.

Initial conclusions:

The first conclusion is that there is a need for a context-specific nuanced typology for platforms operating in the home care sector. As seen throughout this report, there are at least eight tech digital platforms specialising in home care with two different business models: digital placement agencies and on-demand. One of the digital placement agencies is recognised as a social impact enterprise. In addition, the international and multi-service platforms appear to operate under the on-demand model. However, there is a need for further research to confirm this and this research might find additional models.

While the on-demand and digital placement models share common elements, they differ in three key areas. In the case of the digital placement agencies, the selection process is still largely managed and overseen by a person, even if algorithms facilitate and speed up the process. Because the services are usually long-term, the relationships between client and carer are also long-term, meaning the "matching" takes place sporadically. This is different with the on-demand model where services tend to be one-off, short-term and ad-hoc. Finally, in the digital placement model, the carer is (or should be at least) employed by the family under the Special System, unless they are employed by the company itself.

As the Domestic Workers' Union in the US says, domestic workers are the original gig workers. In the case of Spain, the platforms entering the home care sector might have more agile and automated processes compared to traditional placement agencies, and they have been able to scale and offer services across different cities with minimum infrastructure. However, the externalisation and commodification of care and the use of intermediaries by families to find a carer predates the rise of platforms.

Related to this, there are certain factors that influence how, when and which industries are “platformised”. This is a subject that merits further study.¹⁶⁸ As seen from our analysis, and in line with the Data & Society report on the US, the term “uberisation” should be used with caution when referring to the emergence of digital platforms across different sectors. For one, it does not capture the full spectrum of platform models operating in the platform economy today. Furthermore, the care sector is very different to, for example, the taxi sector. The care sector is mostly informal, with a third of the work estimated to be undeclared. It has a highly feminised workforce and specific entry barriers. “Trust” takes on a much more important role than in other sectors and the employer in the care sector is often the family, which has implications not found in other platformised industries.

Also, across the board, these new market players emphasise their ambition to modernise, professionalise and formalise the sector. In this regard, the research has led to several insights.

One is the need to define what is understood by professionalising and formalising the sector. They might be very legitimate ambitions but at the same time, the use of these concepts also offers private companies positive branding opportunities. After all, the social mission discourse is not specific to these new platform companies. Some traditional placement agencies and other entities have also expressed their efforts to formalise and professionalise the sector, and they too also emphasise how they only work with professional carers.

The digital platforms who enforce the formalisation of the user-carer relationship (under the Special System) as a prerequisite for users to employ platform services, are helping reduce the number of informal work arrangements. This is a cause for celebration. Given that estimates say a third of domestic work is undeclared, the entrance of new actors that positively contribute to the formalisation of working arrangements is of vital importance.

Formalisation in itself, though, does not guarantee further professionalisation of the sector or the regulation of working conditions. And even in these cases, families continue to employ workers under the Special System of Domestic Workers, often to provide care in a full time or live-in situation. So, there is still no professionalising impact on the sector strictly speaking in the sense that there is no increase in the actual numbers of carers employed as professional carers by local authorities or companies themselves.

In addition, professionalisation involves formal training and accreditation, as happens in the case of the professional carers under the LAPAD law, and also a periodic revision of professional competences. Beyond what platform companies might be able to do on an individual level, they do not have competences in any of these areas. Therefore, aside from ad-hoc initiatives, the platforms would appear to be having little positive impact on the professionalisation of the workforce. However, they might be playing a role as standard-setters by establishing entry requirements and in so doing, codifying their own definition of what it means to be a professional carer.

Overall, good intentions are not enough. Social-economic policies and social security laws are essential elements that, when combined with the role of intermediaries, can influence the extent to which working relationships are formalised.

¹⁶⁸ Lehdonvirta et al. 2020

Furthermore, formalisation does not, by definition, go hand-in-hand with decent working conditions. Ensuring home carers have full rights and decent working conditions requires the participation of all social actors involved including workers themselves. But as discussed in section four of this report, domestic and home care workers have faced numerous challenges over the years when trying to organise and bargain collectively. The platform models found in other sectors have not encouraged trade unionism. How could the new intermediaries encourage collective organisation in the domestic and care sectors, instead of further encouraging the individualisation of social relations, remains open for discussion.

Indeed, platforms and technology could play a role in supporting decent work. Some founders hinted at this in their interviews when talking about mediating on behalf of live-in carers. For example, when clients try to override carers' rights to time off or the minimum wage. Understanding the ways these new intermediaries might be having a positive impact or, conversely, entrenching existing forms of discrimination and amplifying the worker-client power imbalance would be extremely valuable. The literature on the platform economy is already highlighting some of the problems emerging from the platform design in other sectors. While they might share common features and encourage certain similar work practices, extrapolating the experience of one sector such as the delivery or transport to other sectors such as domestic and home care is unadvisable. There is a need for more context and sector-specific research.

Finally, this report has focused on platforms specialising in home care. There are a number of other national and international companies operating in Spain using mobile apps and web platform technologies to match offer and demand for other household services (cleaning, pet care, gardening, maintenance, and also elderly and childcare). These would appear to mostly be following the on-demand model and merit further investigation.

What next?

Going forward, there is an urgent need for research on the experiences, motivations and working conditions of those finding work, and also the experiences and motivations of those finding carers, through these new intermediaries.

Questions to answer

First off, **who are the carers?** Platforms are gathering a vast amount of information and demographic data, but as Digital Future Society's recently published literature review report highlights, there is very little information available on worker profiles and workers' experiences.¹⁶⁹ Although outside the research boundaries of this report, there is a need to interview workers themselves and add their insights to the literature on care work in Spain.

Looking forward, all the digital placement agencies interviewed have experienced a significant rise in demand at the height of the Covid-19 health crisis between March and June.¹⁷⁰ **What role will digital platforms in this sector play in years to come?**

¹⁶⁹ Digital Future Society 2020

¹⁷⁰ Digital Future Society and Interamerican Development Bank 2021

Those working in home elderly care are some of the most vulnerable groups, especially migrant workers. The platforms operating in the care sector emphasise their role in supporting the formalisation of care work and the support of carers vis-a-vis the clients. However, experiences of work mediated through platforms in other sectors indicate new vulnerabilities resulting from this form of employment. The literature on the on-demand platforms in the ride-hailing and transport sectors documents the negative experiences relating to the use of algorithms and having to interact with a “system” as opposed to a human being. **To what extent are digital platforms mitigating or reinforcing existing challenges to workers’ rights in the sector?**

At a time when platforms are entering the space as new actors, now is the time to act. “Collective action and public regulation could help in shaping the design of ‘platform care’ and minimise the negative impact on workers.”¹⁷¹ **Which best practices could be put in place to incentivise the prioritisation of decent work?**

Finally, cooperatives are collectively owned and governed by the people who depend on and participate in them.¹⁷² An increasing number of cooperatives are emerging to provide home care in countries with rapidly ageing populations. In Italy, Japan, Canada and the United States, there are many home care cooperatives where workers provide home care services to children, the elderly, people with chronic illness and disabilities.¹⁷³ An example of a platform cooperative operating in this sector in the UK is Equal Care, the “platform co-op radically reimagining social care”, the UK’s first platform-based social care and support co-operative operating in the Calder Valley.¹⁷⁴ What about alternative models, such as cooperatives, as a potential route to a fairer home care sector?

¹⁷¹ Trojansky 2020

¹⁷² Borkin 2019

¹⁷³ ILO 2013

¹⁷⁴ Lloyd 2019

Annex

Annex A

Across the world, there are varying definitions of domestic work in statistical surveys. In Spain, there are two main statistical classifications. The CNAE (Economic Activities National Classification) classifies activities according to the workplace. The Occupation National Classification (CNO) classifies occupations according to the type of work and the professional competencies. These two statistical methods, therefore, collect and measure different data and realities, according to the theoretical approach used.

Most frequently, domestic work is measured by the CNAE-09 through the code 970 for Activities of the households employing domestic workers. It includes all activities which take place in the household, including personal training, private tuition, elderly and childcare.

As discussed in section one of this report, some authors are critical of this classification, arguing it renders home care services invisible and that statistics should be based on the type of work and professional competencies, rather than the workplace. The categories CNO-11 910 “domestic workers” (which includes only people employed as domestic workers), the CNO-11 571 “home carers” and CNO-572 “childminding in the home” could provide a more realistic estimate of the home care workforce in this regard.

Annex B

Dimensions and indicators of informality-formality of employment in domestic work

Dimensions	Indicators	Informality	Formality
Labour rights legal framework	Legal recognition of employee status with associated entitlements as an employee	Not recognised by law or partly recognised	Recognised and governed by law
Social security rights legal framework	Legal recognition of social security coverage of domestic workers Note: Exclusions may still occur due to differences in entry and eligibility requirements (for example in case of exclusion of some categories of part-time workers, those with multiple employers, or those who work less than a certain number of hours per employer.).	Not recognised by law	Recognised and governed by law
Declaration & registration with public authorities (social security and administrative units depending on national regulatory system)	Social security registration	Not registered	Registered
	Payment of contributions to the social security system	Not paying	Paid
	Registration with administrative unit (depends on national regulations)	Not registered; undeclared work	Declared work
Formal employment practices	Employment contract with terms of employment (tasks, wage, hours)	No agreement	Oral or written contract
	Record of payment; payslip	No payslip	Payslip

Figure 12. Image source: Digital Future Society. Data Source: ILO 2016

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Thank you to the following platforms for their contributions to the report through interviews:

- **Aiudo, Cuideo, Depencare, Familiados and Joyners.**

Thank you to the following experts for their contributions to the report through interviews or revisions of the text:

- **Aayush Rathi** - Policy Officer, Centre for Internet and Society, India.
- **Carmen Juares** - Coordinator in the area of New Work and Precarious Realities, Comisiones Obreras (CCOO), Spain.
- **Claire Hobden** - Technical Officer on Vulnerable Workers and coordinator of the ILO strategy on decent work for domestic workers at the ILO.
- **Emma Samman** - Research Associate, Overseas Development Institute, UK.
- **Julia Ticona** - Assistant Professor at the University of Pennsylvania's Annenberg School for Communication and Faculty Affiliate at the Data & Society Research Institute, United States.
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Thank you to the following Digital Future Society Think Tank colleagues for their input and support in the production of this report:

- **Carina Lopes** - Head of the Digital Future Society Think Tank.
- **Patrick Devaney** - Editor, Digital Future Society Think Tank.
- **Tanya Álvarez** - Researcher, Digital Future Society Think Tank.

Citation

Please cite this report as:

- Digital Future Society. 2021. Home care and digital platforms in Spain. Barcelona, Spain.

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