

Collection of Factsheets on Online Platforms and Platform Work in Selected Countries



Content

FOREWORD	3
-----------------	----------

FACTSHEETS

Armenia	4
Austria	6
Belgium.....	8
Bulgaria.....	10
Croatia.....	12
Czechia	14
Denmark.....	16
Estonia	18
Finland	20
France	22
Georgia.....	24
Germany.....	26
Greece	28
Italy	30
Latvia	32
Lithuania	34
Moldova.....	36
Norway	38
Poland.....	40
Portugal	42
Romania.....	44
Serbia.....	46
Slovakia.....	48
Spain.....	50
Sweden.....	52
Turkey	54

ACKNOWLEDGEMENT	56
------------------------	-----------

FOREWORD

The platform economy has been developing and evolving rapidly in the last decade, not only in terms of creating new business models that operate outside traditional ones, but also when it comes to impacting the organisation of work and working conditions of millions of people. Extrapolations of current trends in employment suggest that 42.7 million people in the EU-27 will opt to work in the platform economy by 2030.

In 2021, the FES Competence Centre on the Future of Work initiated the Mapping Platform Economy project. This project sheds some lights on the complexity of platform ecosystem by providing insights into different aspects of platform work at the national level in over 30 countries. The data was collected with the help of national experts in the partnership with FES country office between 2021 and 2023.

Our analysis shows that while there are major differences across European countries, in terms of regulatory aspects, it is still uncertain how many active platforms are in a country, how many people are working on them and with what employment status they work. This type of information is particularly important in addressing the legal responsibility of platform companies, not only in terms of the quality of services provided, but also with a view toward fair working conditions for workers employed by these platforms (Sabanova & Badoi, 2022)¹.

This publication represents a collection of 26 factsheets that look at (1) regulatory aspects, (2) recent legal developments, (3) characteristics of platform workers, (4) characteristics of popular platform companies, (5) the general perception of platform work and (6) collective actions and court cases.

¹ Sabanova, Inga and Badoi, Delia (2022), "Online Platform and Platform work", Policy Report. Brussels: Friedrich Ebert Stiftung, Competence Centre on the Future of Work. <https://library.fes.de/pdf-files/bueros/bruessel/19257.pdf>

ARMENIA

- ✓ ✗ Legally binding definition of online platforms
- ✓ ✗ Specific register of online platforms
- ✓ ✗ Specific regulation applicable to online platforms
- ✓ ✗ Online platforms are considered to be employers

Platform workers are classified as independent/freelance workers with Service Contracts under the Civil Code of the Republic of Armenia. **These contracts are not registered in the Armenian Tax Service system.**



The majority of Armenian platform workers – providing both on-location services and engaged in remote platform work – are **based in the country's capital, Yerevan.**



According to data compiled by analyticshelp.io, **Armenia has one of the highest percentages of online freelancers per capita in the world** (2.18% per 1,000 inhabitants in 2018).



Regarding **incomes from platform work**, the average rates for workers engaged in remote work and on-location services tend to be higher than average labour market incomes in the country.

**AMD
300,000–400,000**

For example, **typical monthly gross earnings of GG Taxi drivers engaged full-time is between AMD 300,000–400,000 (USD 625–830), while the minimum salary is around AMD 75,000 (USD 195).**



In the area of remote work, **the Armenian market is dominated by international platforms** like Weblancer.net, Freelancer.com and Guru.com

With regard to on-location work, along with international platforms, such as **Bolt, Yandex** and **Glovo**, the Armenian market is shared by national platforms - **Menu.am** in the food delivery sector and **GG Taxi** in the area of ride-hailing services.

Menu.am was founded in Yerevan in 2012. The platform provides delivery services from 500 restaurants and specialised stores in Yerevan, Gyumri, Tsakhkadzor, Vanadzor, Abovyan, and Dilijan. The company was backed by venture capital funds from the **Menu Group (UK)**.

GG Taxi was founded in Yerevan in 2013. The platform operates in Armenia and Georgia and connects more than 1200 drivers.



Over 95 percent of Armenian households have at least basic access to the Internet. As a result, the e-commerce market has been booming in big cities, especially Yerevan, in the last few years. Armenians increasingly shop online for a variety of goods, including household appliances, consumer electronics, apparel, cosmetics, toys, meals, and groceries.



Despite the increasing use of different online platforms, platform work has received **no attention at the policy level**.



There is no collective agreement relating to platform work in Armenia.

Under the provisions of the Law on Trade Unions and the Labour Code, platform workers cannot establish workers' organisations and sign collective agreements in Armenia.

However, the confederation of Trade Unions of Armenia provides free legal consulting to all workers, including those engaged in platform work. Workers can contact the legal department of the Confederation by phone or email.



There have been no court cases concerning the employment status of platform workers in Armenia.

AUSTRIA



- ✓ ✗ Legally binding definition of online platforms
- ✓ ✗ Specific register of online platforms
- ✓ ✗ Specific regulation applicable to online platforms
- ? Online platforms are considered to be employers

Austrian law provides a “Freier Dienstvertrag” status, which is a sort of hybrid between genuinely employed and freelance work. The biggest problem with this type of status is that it is covered neither by labour law, nor by collective bargaining agreements (including collective agreements on minimum wage).



4,000



According to unofficial estimates, there are **a maximum of 4,000 workers** who work directly for one of the main delivery platforms in Austria. There is no reliable data for cleaning or taxi services, however.

Vienna
€ 10/h

Salzburg
€ 11/h

Graz
€ 9.50/h

 **mjam.at**
€ 4/

Riders with employment status who work for Lieferando.at earn on average **€ 10 per hour in Vienna, € 11 in Salzburg and € 9.50 in Graz**. Mjam riders, who are classified as independent contractors, earn **€ 4 per delivery**.



The Austrian market is dominated by international platforms such as :

Lieferando/Just Eat, Mjam/Delivery Hero, JokR, Uber, Bolt and Flink.



Some national platforms operate only in urban areas, e.g. Vienna, Graz or Salzburg.

VeloFood was founded in 2016 and operates only in Graz. The platform offers food delivery by bike with 100% biological packaging.

FoodNinja was founded in Salzburg in 2018. The platform offers an on-demand food-delivery service. In 2020, the platform was acquired by **Velonto** – another local food –delivery platform based in Linz.



There have been several important initiatives seeking to provide information and legal advice to platform workers.



In 2017, the ÖGB (Austrian Trade Union Federation), IG Metall (Germany), the Vienna Chamber of Labour (AK Wien), Unionen



There have been no court cases concerning the employment status of platform workers in Austria.

Lieferando.at (Just Eat) has one ongoing court case pending since 2019 challenging the founding of a works council in Vienna.

According to Lieferando, the company has no legal entity of its own in Austria. All major decisions are made either in Germany or the Netherlands, while the app's servers are based in Ireland.

Due to Covid-19 restrictions, the court proceedings have been postponed several times already. The works council itself is active, but still faces the challenge before the court.

(Sweden) in cooperation with Encountering Tech and M&L Communication Marketing launched an initiative called CrowdWork. Their website provides information on existing platforms and their working conditions. A rating has been performed evaluating payment, fairness, transparency and other factors based on information collected and collated with the help of platform workers.



The Austrian trade union GPA (trade union for private sector employees) **offers membership to platform workers along with advice, consulting, information and legal support.**



The Austrian Chamber of Labour (Arbeiterkammer) **offers consulting and legal support for platform workers**, regardless of their employment status.



Since 2020, bike workers (who have employment contracts) have been covered by a collective bargaining agreement. The agreement stipulates the minimum wage, maximum working hours, compensation for the use of workers' own bikes and phones, holiday and Christmas bonuses, period of notice for termination and surcharges for night work and on Sundays.

BELGIUM

-   Legally binding definition of online platforms
-   Specific register of online platforms
-   Specific regulation applicable to online platforms
-   Online platforms are considered to be employers

Based on the Royal Decree of 2017, **online platforms have to meet several conditions to receive official accreditation in Belgium**. The legal framework governing the platform economy is laid down in the Programme Law (2016), which establishes a favourable new tax regime for income obtained through platform work.



The fiscal authorities of Belgium recorded **18,458 platform workers in 2019**, who earned on average **EUR 102 per month** via platforms.

Belgian workers have access to more than **90 online labour platforms**, including 20 domestic ones.

 **tophelp.be**

 **Ring Twice: Yoopies**



According to the 2018 Eurobarometer, platforms in the transport sector and food delivery services have dominated the Belgian market. However, the share of other platforms in the area of household and care tasks, such as **Ring Twice, Yoopies** and **Top Help**, has grown significantly in the last couple of years.

For example, **Ring Twice**, which was founded in 2013, is a Belgian platform specialising in household tasks. The platform has more than 36,000 service providers registered on it.



Belgian trade unions are some of the strongest in the European Union when it comes to collective agreements and negotiating for workers. To clarify the employment status of workers, trade unions from Belgium have supported platform workers in court cases and by submitting specific proposals to the Federal Public Service for Social Security.

The Belgian trade unions, the National Union of Employees (CNE) and the Transport and Communications (Transcom) division of the General Christian Trade Union (ACV) have supported the Belgian Couriers Collective (Collectif des Coursier-e-s / Koeriers-Kollektief), which was created by platform workers in 2016, after the food delivery platform Take Eat Easy went bankrupt.

The General Labour Federation of Belgium (FGTB/ABVV) has launched an initiative for the protection of platform workers. The initiative involves the creation of a network of platform workers online enabling them to obtain information on workers' rights, create groups and networks, and share their platform work experiences. The initiative also seeks to provide support in the form of legal advice and trade union representation.



In 2018, two rulings issued by the Administrative Commission for Employment Relationships stated that **Deliveroo couriers are to be considered as employees**, contrary to what was maintained and practiced by the company.

In 2021, the Administrative Commission for Employment Relationships issued a decision on an **Uber driver's working conditions, stating that they are incompatible with self-employed status**.



In **1 January 2023**, Belgium introduced a legal presumption of employment for platform workers in line with the EC Proposal on improving the working conditions of people working through digital labour platforms.

BULGARIA

- Legally binding definition of online platforms
- Specific register of online platforms
- Specific regulation applicable to online platforms
- Online platforms are considered to be employers

Some forms of atypical employment such as domestic work, teleworking and temporary work (Article 107) are regulated in the Labour Code. Workers in atypical employment have the same labour and trade union rights as other workers. However, **this does not apply to platform workers, who are not covered by Bulgarian labour law.**



According to the ETUI Internet and Platform Work Survey conducted in 2018-2019:

1.5%

only a small group of people rely on platform work for their basic income; **1.5% of respondents in Bulgaria performed platform work on at least a monthly basis;**



Internet and platform workers were **more likely to work on temporary contracts or without any formal contract.**



The Bulgarian market is dominated by **international platforms**, although national companies are represented in various sectors, including food delivery, taxi, cleaning and housekeeping, auto services, IT services and healthcare.



Glovo

domestina



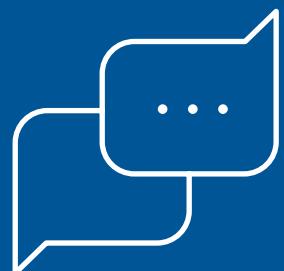
BGMENU.com (БГменю) was founded in Sofia. BGMENU.com was acquired by Just Eat Takeaway for € 10.5 million in 2018.

The **Glovo** platform in Bulgaria started to function in 2021 after the acquisition of the online platform Foodpanda.

Domestina (ДОМЕСТИНА) is a national online platform for ordering cleaning services. Domestina was founded in 2013. In 2018, the platform declared a net income of BGN 270,000 (€ 138,000).

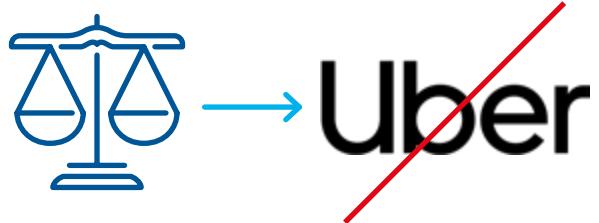


The Confederation of Independent Trade Unions of Bulgaria (CITUB) has been critical of working conditions for platform workers and has proposed some amendments to the Labour Code laying down the rights and obligations of digital workers in particular and work via digital platforms in general.



Platform work is not an issue in political debates or discussed in the public discourse in Bulgaria.

Some evidence of **platform worker resistance** can be found online, however. On the BG Rabotodatel website, for example, workers anonymously share information regarding working conditions and their salaries.



In 2015, the Supreme Court issued a ruling that shut down the Uber platform in Bulgaria.

Provoked by strong opposition on the part of taxi drivers, in February 2015 the National Revenue Agency, the Ministry of the Interior, the Automobile Administration Agency and the Ministry of Transport started an investigation into Uber's activities in Bulgaria.

The debate over Uber's activities in Bulgaria also triggered changes in the law. Amendments to the Road Transport Act revoking the possibility for drivers to perform taxi services on behalf of registered carriers for their own account were adopted in 2016. Drivers who want to continue working on their own account must register as carriers under the Road Transport Act and the Taxi Passenger Transport Ordinance.

Thus, the new legislation required all taxi drivers to have labour contracts.

CROATIA



- ✓ ✗ Legally binding definition of online platforms
- ✓ ✗ Specific register of online platforms
- ✓ ✗ Specific regulation applicable to online platforms
- ✓ ✗ Online platforms are considered to be employers

Under the **Road Transport Act** (NN 41/18, 98/19, 30/21, 89/21) that was adopted in 2018, operations of platforms providing taxi transport services are subject to regulation.



30,000



40,000

The Ministry of Labour, Pension System, Family and Social Policy has estimated **the number of platform workers in Croatia at between 30,000 and 40,000**.



Migrant workers make up a large part of delivery platforms' workforce.



Bolt
Uber

Glovo

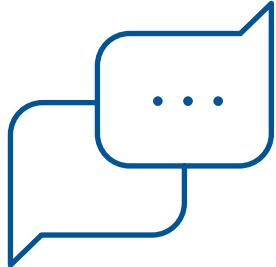


The most popular and only well-known platforms that operate in Croatia are **Wolt**, **Bolt**, **Uber** and **Glovo**.




foodpanda

Pauza.hr is a Croatian online food-delivery platform founded in Zagreb in 2014. The platform was acquired by **Foodpanda - Romania and Bulgaria**, which also belongs to **Glovo**.



There is an ongoing debate in Croatia on the status of platform work in light of forthcoming amendments to the Labour Act. The Ministry of Labour, Pension System, Family and Social Policy has announced that platform work is to be regulated through employment contracts. This means that platform workers will be subjected to domestic legislation. Provisions on work through digital working platforms will enter into force on 1 January 2024. Work performed through digital working platforms is to be extensively regulated, including *inter alia* through the following: (i) mandatory content for the employment agreement, (ii) use of automated management systems, (iii) processing of employees' personal data, and (iv) protection of independent contractors performing work. Digital working platforms and aggregators will need to register with the relevant register maintained by the ministry in charge.



The Digital Platform Workers Trade Union (SRDP in Croatian) was set up in September 2021 with the help of the Union of Autonomous Trade Unions of Croatia (SSSH). The SRDP provides support to workers on platforms by organising training events, encouraging the exchange of best practices and fostering a political discussion on wider aspects of work at platform companies.

The first action undertaken by the newly established Union of Digital Platform Workers was a three-hour boycott of the Uber application to protest against a delay in wage rises. The boycott was organised in front of Uber headquarters in Zagreb. Although the workers staged their protest in front of company headquarters, no one from Uber responded. This protest also involved a shutdown of the Uber application by the workers between 7 and 10 p.m.

There have been no labour disputes or court cases concerning platform work in Croatia to date.

Many journalists have critically discussed platform work in Croatia, providing examples of wage dumping, unreported work to avoid taxes and lack of access to social security and basic working conditions such as minimum wage, pension insurance, paid sick leave and/or annual leave, and specified breaks for platform workers during working hours.

CZECHIA

- ✓ ✗ Legally binding definition of online platforms
- ✓ ✗ Specific register of online platforms
- ✓ ✗ Specific regulation applicable to online platforms
- ? Online platforms are considered to be employers

The Czech legal system does not recognise or define online platforms as specific subjects. Employment law specifically regulates the brokering of employment (435/2004 Coll., Art. 14a) and temporary agency work (435/2004 Coll., Art. 14b). Digital labour platforms involved in such activities are to be classified as employment agencies.



While there is a dearth of data on working conditions for platform workers, media reports suggest long hours and low hourly pay in the areas of food-delivery and ride-share. There are also reports of Uber drivers, who are often migrant workers from outside of the EU, being recruited through intermediaries and working with informal arrangements involving low pay and excessive hours.



Czech workers have access to more than 100 online labour platforms.



Based on data from the ETUI Internet and Platform Work Survey, men working 20 hours or more per week or earning more than 50 per cent of their income through platforms account for 84.5% of platform workers in comparison to only 15.5% for women.



Bolt Uber Uber Eats

Along with international platforms, such as Bolt, Uber and Uber Eats, there are also national platforms operating in the market.



Hlidacky.cz operates childcare services. The platform was founded in 2012.

Damejidlo.cz is a food-delivery platform founded in 2010.

Doucuji.eu is a marketplace for private tutoring.



There has not been any attempt to organise platforms workers collectively by existing trade union organisations in Czechia. There are no associations representing platform workers.



The issue of tax obligations is relatively prominent in the policy debate. An analysis conducted by the government in 2017 identified corporate income tax avoidance as a problem, using Uber as an example of a company that uses sophisticated corporate structures and tax-shifting through licence fees to avoid paying taxes in the countries where it actually provides services and uses public infrastructure.



No cases relating to employment status are pending before the courts.



There have been a series of court cases relating to the applicability of law regulating passenger transport (taxi) to Uber, producing a series of conflicting judgments and rulings, in effect allowing the company to operate in Prague, but not (necessarily) in other cities.

A local court in Prague effectively lifted a ban on Uber by the city of Prague in 2016. A year later, however, the same court upheld a similar ban on Taxify. In the same year, a regional court found a ban on Uber by the city of Brno to be legal. Uber then won an appeal before a higher court, but this was overturned by the Constitutional Court in 2018.

As a reaction to legal uncertainty, and presumably also in reaction to the ECJ ruling, Uber signed a memorandum with the Czech government in 2018.

DENMARK

- Legally binding definition of online platforms
- Specific register of online platforms
- Specific regulation applicable to online platforms
- Online platforms are considered to be employers

Wage and working conditions are not subject to law in Denmark, and are instead regulated by means of collective bargaining between unions and employers' associations. The Danish government has recently launched a labour law analysis to reveal possibilities for a presumption rule.



Only **1% of the population of working age** is engaged in platform work in Denmark.



On average, most platform workers earn **less than DKK 25,000 per year** via the platforms before taxes.



While the share of women and men among platform workers is nearly the same, **platform workers tend to be young and have total personal incomes below the national average**.



Just Eat and Wolt are the two largest food-delivery platforms in Denmark.

Just Eat, a food delivery platform, was founded in Denmark and has recently merged with a Dutch platform, **Takeaway**.

Wolt is an international platform from Finland. In 2021, Wolt was merged with an American platform, **DoorDash**.



Several international platforms have their headquarters in Denmark. Among them are two cleaning platforms, **happyhelper.dk** (also operating in Germany) and **Hilfr.dk**.

Worksome is the largest freelancer platform, with offices in London and New York.



Most platform workers in Denmark have the status of independent contractors. However, at Hilfr.dk some platform workers are employed on zero-hour contracts, at JustEat some employees work on marginal part-time contracts and at Mploy all platform workers are temporary agency workers hired as employees on short-term contracts.



The current public debate mainly revolves around the self-employment status of platform workers, as many platform workers do not report their earnings, and self-employed platform workers are not covered by the Working Environment Act.



There are few court cases on platforms in Denmark. Recently, the Danish Competition and Consumer Authority issued a decision on Hilfr.dk and Happy Helper. The decision criticised the minimum wages paid to freelancers working via the two platforms as well as the lack of managerial instruction for employees working via Hilfr.dk

These two aspects were corrected by the platforms. The decision made it clear that it is not possible to establish minimum wages for freelancers and that employees should have employee status when it comes to managerial practice as well.



In **2018**, a collective agreement was reached with Hilfr.dk concerning platform workers' wages, social contributions and working conditions.

In **2021**, a sector-level agreement was negotiated, regulating wages and working conditions for food delivery platforms. The first platform to sign was Just Eat.

However, the food delivery platform - Wolt failed to agree on a minimum hours guarantee under the sectoral agreement. Wolt Workers' Group - a grassroots initiative that does not participate in collective bargaining, organised several collective actions. The group is now supported by the union 3F.

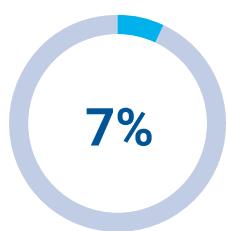


ESTONIA

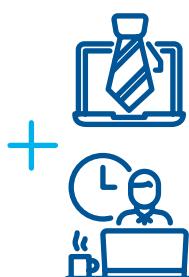


- Legally binding definition of online platforms
- Specific register of online platforms
- Specific regulation applicable to online platforms
- Online platforms are considered to be employers

In 2021, the **Information Society Services Act** was amended with the objective of ensuring enforcement of the EU's Platforms Regulation and the e-Commerce Directive in Estonia. The amendment designates the Consumer Protection and Technical Regulatory Authority to exercise supervision over providers of online intermediation services and specifies liability for violation of the Act.



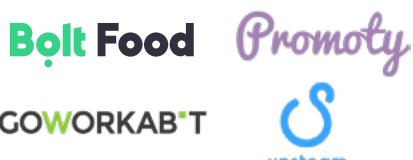
Only 7% of the working population in Estonia work via platforms at least once a week. This is approximately 56,000 people.



Estonian workers consider platform work to be a temporary activity rather than a long-term career choice. Most workers combine platform work with other activities.



The average net income of people working via platforms is lower than those who do not work via a platform.



Four international platforms have their headquarters in Estonia.

Bolt is a transportation network company that was founded in 2013. The platform operates in 300 cities in 45 countries around the world.

GoWorkaBit is an online staffing platform for on-site short-term jobs that was founded in 2013. In 2021, the company had a turnover of €1,844,320.

Promoty is a platform that helps brands and agencies to find the right influencers. The platform was founded in 2017. Currently, the company works on influencer marketing campaign in eight markets covering the Baltics, Nordics and Netherlands.

UpSteam is a mobile car-wash platform that was founded in 2017. The platform operates in Estonia and Finland.



The public discourse is highly influenced by a techno-optimism that regards platform work as a business opportunity. As a result, algorithmic control, sanctions for non-compliance, declining income, a competitive work environment or other conditions that negatively affect workers have been largely absent in the debate in Estonia.

Nevertheless, some studies suggest that Estonian workers are struggling with the way the quality of their work is assessed. There is a growing use of customer rating systems that workers find unfair and difficult to challenge. Negative ratings can lead to the closure of their profiles. As a result, workers cannot enter into a dialogue with platforms, as the customer service of some platforms is difficult to reach or only responds with delay.

In the majority of cases, the discussion on the employment status of platform workers has been dominated by the views of those who favour the status of independent contractor. Reclassification of the current status is seen as a threat to flexibility both by platform companies and the Estonian Employers' Confederation, but even by some platform workers.



There are no collective agreements at any level covering platform workers in Estonia. In many cases, platform workers see the solution in leaving the platform if they feel dissatisfied with working conditions rather than entering into a dialogue with the platform or organising with other workers. In some cases, the accounts of platform workers were closed down after they publicly criticised working conditions, for instance in online communities.

Even if there is a lack of solidarity among Estonian platform workers and low interest in organising, there are a couple of important initiatives that can be singled out.



In **2019**, Bolt drivers organised a protest against the pricing system. Drivers switched off their app during peak hours. However, no agreement was reached.



In **2020**, a few Estonian taxi drivers created a non-profit organisation called 'Eesti Taksokoondis' that represents the interests of all drivers (both traditional taxi drivers and those who work via platforms). The goal of the organisation is to fight for better working conditions and create an alternative ride-hailing platform that is managed by the workers themselves.

FINLAND

- Legally binding definition of online platforms
- Specific register of online platforms
- Specific regulation applicable to online platforms
- Online platforms are considered to be employers

The government over the period 2019–2023 has proposed a revision of the Employment Contracts Act to prevent employment from coming about under the guise of other contractual relationships. This can be understood as a reference to platform work.



+45



Finns have access to more than 45 remote work platforms operating in Finland, although platform work is less frequent here than in other European countries.

In 2018, only 6.9% of the working-age population had ever provided services via online platforms, while **59% of platform workers were in the age group 18–24 years.**



yango



Freska



Semantix



Wolt, Foodora, Yango, eWork, Freska, and Semantix Finland are the most popular online platforms in Finland.



Around 30% of platform companies operate within the transport sector.

Wolt is one of the best-known Finnish food delivery platforms. The company was launched in Helsinki in 2015. Since its inception, Wolt has expanded to 23 countries and more than 250 cities. In 2021, Wolt was acquired by an American company, **DoorDash**.



There has been **an increasing number of road accidents resulting from e-scooters** in Finland. In 2021, speed limits were lowered from 25 to 15 kilometres per hour in Helsinki.



The public debate has mainly focused on **the ambiguity surrounding the employment status of platform workers in Finland**. Wolt has been advocating for a new model by introducing a third category apart from the existing categories of an employee and an entrepreneur. The proposed third category would include platform workers, who are classified as independent contractors. These would then remain entrepreneurs, but would be issued a level of insurance by the company and would be entitled to engage in collective bargaining.

Nevertheless, most academic researchers and social partners have rejected the idea of a third category by noting that the work done on online platforms should be subject to the existing labour law framework.



In **2018**, the Foodora couriers launched the Justice4Couriers campaign with Vapaa Syndikaatti and Vastavoima members to improve working conditions after Foodora had unilaterally cut the pay of the already precarious couriers. Later, Wolt couriers joined the campaign, because also Wolt had ordered pay cuts, and couriers in both companies lack security and basic workers' rights.



In **2020**, the Labour Council issued two opinions concerning the legal status of food couriers working in the platform economy. According to the Labour Council, food couriers of the companies that were the subject of the request for opinions are considered employees and fall within the scope of the Working Hours Act.



In **2021**, the Service Union United (PAM) filed a lawsuit against Wolt asking the District Court of Helsinki to provide a ruling on the case of a courier's employment status. The case is based on a new payment model introduced by Wolt in 2018. As a result, the hourly pay of Wolt riders was reduced from € 12 to € 10.

FRANCE

- ✓ ✗ Legally binding definition of online platforms
- ✓ ✗ Specific register of online platforms
- ✓ ✗ Specific regulation applicable to online platforms
- ? Online platforms are considered to be employers

Under the 2016 Finance Act, and reinforced by the 2018 **Law against Tax Fraud**, platforms have to report the following information to tax authorities (DGFIP): identification details about the platform operator concerned, identification details about the user, the user's status (private or professional), and the total gross amount of transactions carried out by the user during the previous calendar year.



+100

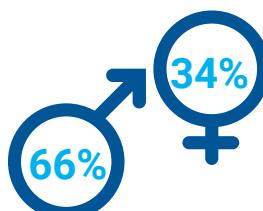
French workers have access to **more than 100 online labour platforms.**

The share of men working for platforms tends to be significantly higher, with **females accounting for 34% and males 66%**.



32% of platform workers have a migrant background.

Thus only 14% of couriers working in Paris area are French nationals.



Uber Uber Eats

Along with transport and food-delivery platforms, such as **Uber** and **Uber Eats**, a large portion of the market is dominated by business services.

In 2021, 72 freelance and microtasks platforms were in operation.



Malt, a freelance platform that was founded in France in 2013 currently has over 260,000 registered freelancers.

Freelance.com is another French platform that specialises in providing intellectual services to large businesses and SMEs. Currently, the platform has more than 370,000 registered freelancers.



Since 2016, platform workers have also been entitled to continuing vocational training. The contribution to this training is supposed to be paid by the platform.



There is no collective agreement relating to platform work in France.

Since 2017, workers' organisations have been active in promoting the establishment of a balanced social dialogue between platforms and workers.

Workers' organisations have taken part in various initiatives started up by the public authorities: the "États Généraux des Nouvelles Régulations du Numérique" in 2018, the "Frouin" mission in 2020, and the "Mettling" mission in 2021.

Well-established and emerging trade unions/workers collectives, such as CLAP, SCP-VTC or INV, offer legal and administrative advice to workers, including in court procedures involving reclassification of workers' contracts.



In 2018, the Court of Cassation presided for the first time over a case involving how to qualify the subordinate relationship between Take Eat Easy and delivery workers.



In 2020, the Social Chamber of the Court of Cassation deemed the partnership contract of an Uber driver to be an employment contract.



In 2022, Paris Criminal Court issued a € 375,000 fine against Deliveroo for abusing the self-employed status of its workers.

With regard to algorithmic transparency, a number of appeals have also been filed before the CNIL (National Commission on Informatics and Liberty), an independent French administrative regulatory body, notably in reference to Article 22 GDPR (automated individual decision-making). One of these appeals was filed by the Ligue des droits de l'Homme, seeking a court ruling condemning abusive disconnections of drivers.

GEORGIA

- ✓ ✗ Legally binding definition of online platforms
- ✓ ✗ Specific register of online platforms
- ✓ ✗ Specific regulation applicable to online platforms
- ✓ ✗ Online platforms are considered to be employers

In 2020, Georgia's Parliament adopted an important labour law reform package providing much greater protection to workers. **The law makes no reference to platform work, however.**



The majority of Georgian platform workers – providing both on-location services and engaged in remote platform work – are based in the country's capital, Tbilisi.



→ \$ 500-600 /month

Service sector

→ \$ 130-160 /month

Regarding incomes from platform work, the average rates for workers engaged in remote work and on-location services tend to be **higher than average labour market incomes in the country.**

For example, successful platform workers registered on Freelance, Weblancer, and Guru.com can earn around USD 2,500.

Typical gross monthly earnings of Bolt Taxi drivers engaged full-time is USD 500-600, while the average monthly salary in the service sector is around USD 130-160.



fiverr. Weblancer upwork

FREELANCE

iDo

freelancer

Georgian workers have been active on a number of remote work platforms, such as Ido.ge, Upwork, Fiverr, Freelancer.com, Weblancer.net and Freelance.ru.



Bolt



Yandex Taxi

Alo Modi

Bolt Food

Glovo

Glovo, Bolt, Bolt Food, GG Taxi, Alo Modi, Wolt and Yandex Taxi were the most-used on-location platforms.

Ido.ge is an online employment platform that provides different freelance services, such as graphic design, tutoring or translations. The platform was founded in Tbilisi in 2015.



Since the COVID-19 pandemic, the platform economy, especially in the area of food delivery and raid-hailing services, has been on the rise in big cities, where the share of households with Internet access is significantly higher. Many ride-hailing and delivery apps have started operating in the urban centres of Kutaisi, Batumi, Rustavi, Telavi, Poti, and Mtskheta.



There is no collective agreement relating to platform work in Armenia.

In December 2020, January 2021 and March 2021, in the capital Tbilisi, delivery drivers from Wolt, Glovo, and Bolt Food respectively organised protest actions and went on strike. In all cases, the strikes were triggered by unilateral changes in the remuneration system.

Instead of acknowledging their responsibilities to negotiate with workers, platform companies have tried to prevent them from protesting and have recruited replacement couriers. Most workers who took an active part in the protests have found themselves blocked on the apps.



There were two important cases used by public authorities to address platform workers – both the Public Prosecutor's Office and Georgia's Labour Inspectorate have held that app-based couriers should be classified as employees, and have urged delivery companies to uphold and enforce labour law.



In **2020**, following a courier traffic accident, Georgia's Labour Inspectorate inspected and fined Glovo for not complying with basic work safety standards.



In **2021** the Public Prosecutor's Office in Georgia affirmed that couriers working for Glovo – an international food delivery enterprise – have a labour relationship with the company and are entitled to guarantees under labour law.

GERMANY



- Legally binding definition of online platforms
- Specific register of online platforms
- Specific regulation applicable to online platforms
- Online platforms are considered to be employers

There are two legislative acts concerned with the definition of platforms. **The Act on Restraints of Competition** is explicitly aimed at digital companies that are defined as companies with outstanding cross-market significance for competition and access to competition-relevant data. The act also introduces the legal notion of "intermediation power" to capture platform particularities. **The Network Enforcement Act** relates mainly to social media platforms, defining them as telemedia service providers which operate platforms on the Internet for profit.



+60



Germans have **access to more than 60 remote work platforms**. For the majority of platform workers, it is a secondary source of income.

For many workers with migrant backgrounds who face a language barrier in Germany, **platform work constitutes an entry point into the labour market**.



€ 3,400,000,000

Some experts contend that the economic importance of platform work is relatively low in Germany. Online grocery sales in Germany have been increasing, however. **Turnover for the ride-sharing and taxi-ride sector amounted to EUR 3.4 billion in 2021**, with this figure including rides from traditional taxi companies as well as from online platforms.



Most popular platforms in Germany:



clickworker

FREE NOW

GORILLAS



Lieferando is one of the largest food delivery providers in Germany, with a turnover of EUR 374 million. It belongs to the Dutch company Takeaway.

Clickworker.de is one of the largest crowdworking platforms and is owned by the US-based company clickworker.com.

Freenow is the most popular taxi app in Germany. The company belongs to Daimler & BMW under the rubric of «Your Now» and has a turnover of EUR 2 billion.

Gorillas is the best-known German platform specialising in delivery of groceries by bicycle couriers. In 2021, the company had a turnover of EUR 260 million.



Even if platform work has not received much attention in the public debate, many issues relating to digital transformation have been discussed under the caption of **Industry 4.0** by industry representatives and state actors. The importance of data protection at the workplace has had a particularly prominent place in the public debate. Various parties and trade unions have been calling for an employee data-protection law in addition to the requirements laid down in the GDPR.



There are a number of different initiatives addressing the rights of platform workers in Germany.

faircrowd.work is an online platform of IG Metall operated in cooperation with the ÖGB, the Vienna Chamber of Labour and the Swedish trade union Unionen. The platform collects information from the perspective of platform workers, offers advice and informs workers about their rights.

The Tech Workers Coalition is an international grassroots movement of workers in the technology sector, with representative offices in Berlin and Munich.

The association **Action against Labour Injustice** supports workers and work councils resisting union-busting and uses high-profile campaigns and actions to draw attention to worker's rights.



There is no collective agreement relating to platform work in Germany.

One of the best-known initiatives that emerged from the founding of a works council in Cologne at the time at Foodora was «Liefern am Limit» (Delivering at the Limit), whose long-term goal is to fight for a collective agreement for bicycle couriers.

In a landmark ruling handed down in December 2020, the Federal Labour Court classified a crowdworker who worked on a micro-service platform as an employee. The crowdworker took photos of products on display for the platform in retail outlets and at petrol stations. With the support of the trade union IG Metall, he had taken action before the highest labour court, claiming that he was in an employment relationship with the platform. The court agreed with him.

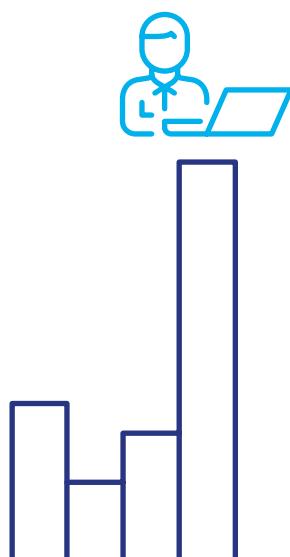
GREECE

- ✓ ✗ Legally binding definition of online platforms
- ✓ ✗ Specific register of online platforms
- ✓ ✗ Specific regulation applicable to online platforms
- ? Online platforms are considered to be employers

In 2021, a new labour law, 4808/2021, came into force in Greece. The law introduces a **protective framework** for those engaging in platform work and provides a definition for digital platforms as "businesses that operate either directly or as intermediaries by connecting through an online platform service providers or businesses or third parties with users or customers or consumers to either facilitate transactions between them or to directly trade with them".



Data on platform workers is non-existent in Greece. Considering that many platforms, especially in the transport and food delivery sectors, have been expanding their businesses in Greece, it is possible to assume that the number of platform workers have also grown in recent years.



Furthermore, **Greece has an unusually high share of self-employed** or autonomous workers in comparison to other EU Member States.

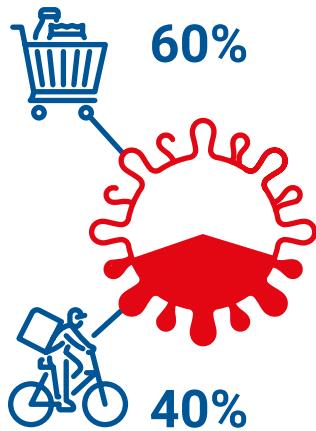


Efood, Wolt and Rocket dominate the food delivery market in Greece.

Efood was founded in 2011 in Greece. The platform works with more than 20,000 stores in 100 cities. In 2015, E-food was acquired by **DeliveryHero**.

Wolt is an international platform from Finland. In 2021, Wolt was merged with an American platform, **DoorDash**.

Before 2022, a Ukrainian food delivery company, Racketa, that rebranded itself adopting an English name – **Rocket**, was also one of the most popular platforms in Greece. In 2020, the platform moved its headquarters to Amsterdam and operated in the Netherlands, Cyprus, Greece, France, Portugal, Spain and Hungary. The company stopped its services in the early 2022.



The negative effects particularly of the 2008 economic crisis have contributed considerably to the growth of services provided by platforms in the hospitality/tourism food delivery sectors, opening opportunities for new forms of employment and sources of income. **The COVID 19 pandemic** has also had an effect on the rollout and use of services provided via platforms, for example some food platforms have expanded their services to the delivery of groceries from supermarkets. Some estimates suggest that 4 out of 10 Internet users placed food orders online during the pandemic.



Media and policy debates have been predominantly focused on two broad issues: **potential tax evasion** and avoidance practices of the platform companies and whether the platform economy may lead to **the erosion of full-time and stable employment**.

In 2021, Greece introduced a digital nomad tax that aims to attract remote workers from abroad as well as from the Greek diaspora. The law promises 50% income tax reduction for the first seven years of residency in the country. The bill reflects Greece's ambitions to diversify its economy into the digital sphere.



There is no collective agreement relating to platform work in Greece.

In 2021, a strike was organised by Efood delivery workers.

Efood platform refused to renew workers' contracts unless they accepted freelance contracts. The strike was met with a huge outpouring of public support, with thousands of customers uninstalling the company's app during the strike.

Following public pressure and strikes organised by delivery workers, Efood eventually proceeded with the upgrading all delivery employees' employment contracts to indefinite term contracts.

ITALY

- Legally binding definition of online platforms
- Specific register of online platforms
- Specific regulation applicable to online platforms
- Online platforms are considered to be employers

Based on the **Legislative Decree of 2015** (amended in 2019), digital platforms are deemed to be computer programs and procedures of companies that, regardless of the place of establishment, organise activities involving the delivery of goods, while fixing the price and determining the mode 'of execution of the service'.



+100

Italian workers have access to more than 100 online labour platforms.

1,000,000



700,000

The number of workers is estimated at **between 700,000 and 1 million** according to research carried out by Fondazione Rodolfo DeBenedetti in 2018.



The operations of global platforms doing business in Italy has significantly increased in the last couple of years.

 deliveroo

Uber Eats  Glovo[?]

 foodora

 Takeaway.com

For example, the food-delivery sector has been dominated by five international platforms: Deliveroo, Glovo, Foodora, Uber Eats and Takeaway.com.



In **2018**, several platforms active in the delivery sector signed a voluntary agreement in Bologna (MyMenu/Sgnam, Domino's Pizza and Winelivery). Based on the Bologna 'Charter of fundamental rights of digital labour in the urban context' irrespectively of employment status, all workers are protected against discrimination, have a right to the transparent use of data as well as 10 hours of paid assembly, full union rights and the minimum wage in the particular sector.

The Charter is structured in four Chapters covering general provisions, the right to be informed, the right to protection - including to a fair wage, health and safety, protection of personal data, and the right to disconnect – and support from the public administration. The charter is not binding and only those who sign it – on a voluntary basis - must observe it.

In **2020**, the Italian trade union confederations - CGIL, CISL, UIL - and Just Eat signed another agreement covering workers, with provisions being laid down in the Logistics National Collective Bargaining Agreement. Food-delivery riders working for Just Eat will now have access to a fair wage and possess labour rights, as well as receive social, health and safety protection.



In **2019**, the Lazio region adopted legislation covering all digital platform workers, laying down access to training, the obligation to provide health and safety equipment and compensation for the maintenance costs thereof, a prohibition of 'pay per task' and an obligation to provide OHS insurance.



In **2018** the Turin Employment Tribunal ruled in favour of Foodora, holding that "riders" were completely free to accept or refuse any meal delivery requests from the platform, and therefore fit within the category of freelance, not subordinate employment.



In **2020**, a Glovo worker who was disconnected was recognised as an employee.



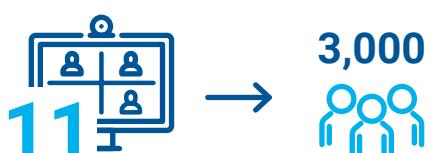
In **2021**, the Court of Bologna recognised Deliveroo platform workers as employees in a case where the Deliveroo platform unfairly dismissed a unionised worker based on a Deliveroo algorithm.

LATVIA



- ✓ ✗ Legally binding definition of online platforms
- ✓ ✗ Specific register of online platforms
- ✓ ✗ Specific regulation applicable to online platforms
- ? Online platforms are considered to be employers

Platforms are considered to be a kind of collaborative economy regulated by two different types of legislation. The first category of platforms surrounds the transportation network for commercial use and is regulated by amendments to the Law on Carriage by Road. The second type relates to online service platforms and is regulated in amendments to the Law on Information Society Services.



The Conceptual Report by the Cabinet of Ministers identified **11 active platforms in 2016**, operating in the transport, accommodation and financial sectors. **These platforms provided over 3000 jobs, accounting for 0.33% of total employment.** The current figure is expected to be higher.



According to ETUI research, Latvia is among those countries where **platform workers tend to earn well below the national or sectoral minimum wage.**



The Latvian market is predominantly shared by international platforms operating in the food-delivery and transport sectors, e.g. **City Bee, Bolt, Bolt Food and Wolt.**

In the recent years, some national platforms have emerged.

Carguru was founded in 2016. The platform provides a car-sharing service.

Fioqsy is another car-sharing service, specialising in eco-friendly solutions. In 2020, the company bought 100 electric cars.



Since the outbreak of the Covid-19 pandemic, discussions on platform work as a new type of employment have been ongoing at the public authority level and characterised by a strong inclination to promote digitalisation in Latvia.

Two strategic documents were adopted by the Cabinet of Ministers in 2021: Guidelines for the Digital Transformation of Latvia and Latvia's recovery and the Resilience Mechanism Plan, in which digitalisation is one of the main aims.

Employment aspects of platform work and ethical issues relating to the use of algorithmic management by platform companies have not received much attention, however, either from the government or the general public.



The Free Trade Union Confederation of Latvia (LBAS) has been supporting the notion that work via online platforms should be recognised as an employment relationship and platforms as employers with all the commitments and obligations related to this status.

In 2020, as a result of the Covid-19 pandemic, LBAS published a call for the protection of workers in atypical form of employment, such as platform work, zero hours' work, occasional work and portfolio work.

There are currently no trade union initiatives to institute collective bargaining on behalf of platform workers. Nor does there appear to be any major demand for support from trade unions on the part of informal groups.



Latvia has not seen any specific court cases or alleged misclassifications of the employment status for platform workers yet.

LITHUANIA

- ✓ ✗ Legally binding definition of online platforms
- ✓ ✗ Specific register of online platforms
- ✓ ✗ Specific regulation applicable to online platforms
- ✓ ✗ Online platforms are considered to be employers

Although the term 'online platforms' is used in the country's legal documents, there is no legally binding definition of Internet/online platforms in Lithuania. A term close to online platforms is to a certain extent regulated by Law No X-614 of the Republic of Lithuania of 25 May 2006 on Information Society Services.



In 2021, Lithuanians had access to **more than 140 platforms**.



There is an ample supply of people who would like to engage in platform work. Food delivery companies receive **more applications for delivery jobs than they can provide**.



The number of food delivery couriers **tripled during the COVID-19 pandemic** in Lithuania.



21-40

Most on-location platform workers tend to be **between 21 and 40 years old** and work in large cities.



The most popular platforms are **Wolt, Bolt Food, Bolt, Uber, ZITICITY, LastMile, Barbora, and Trobos**



The ZITICITY platform was founded in Vilnius in 2017. The platform offers food/product delivery from different ranges of business. By the end of 2020, ZITICITY had partnered with a total of 1,500 businesses.



LastMile was founded in 2019. The platform offers an e-commerce and delivery service for the retailers. By the end of 2021, LastMile had signed cooperation agreements with more than 1,100 couriers and collectors. In total, the platform has more than 200,000 registered users.



In Lithuania, discussions about the legal status and social guarantees for platform workers intensified greatly in 2020. Discussions are mainly initiated by the Courier Association (CA), which was established in October 2020 under the auspices of the trade union G1PS, which currently represents delivery couriers in Lithuania.

According to the Courier Association, there are a number of fraudulent practices affecting platform workers.

1. Platforms do not always sign an employment or service contract with platform workers, which enables them to unilaterally change service rates.
2. Some platforms deliberately miscalculate the distance in the provision of food delivery services to customers.
3. Platforms do not regulate work and break time in Lithuania. To earn more money, a person can work 24/7 and may exceed the maximum limit of 60 hours per week, which means a high risk of burnout.
4. As platforms do not provide accident insurance for their workers, platform workers are not protected against work incapacity.



There have been no collective agreements covering platform workers at sectoral, regional or company levels in Lithuania.



There have been no legal proceedings in Lithuania relating to platform work.

According to the Courier Association, three food delivery couriers were planning to lodge a complaint with a court for being illegally ‘fired’ from Wolt. However, they changed their mind because a civil case would not have held out the promise of any benefits for them, and only a small fine for the Wolt platform.

MOLDOVA

- ✓ ✗ Legally binding definition of online platforms
- ✓ ✗ Specific register of online platforms
- ✓ ✗ Specific regulation applicable to online platforms
- ✓ ✗ Online platforms are considered to be employers

The taxation of individual freelancers in highly skilled occupations is not governed by law. In 2020, Moldova's State Tax Authorities issued a notification establishing that freelancers – including those working on digital labour platforms – fall within the definition of individuals performing professional services and are subject to taxation of their total income from employment as well as income from professional activities.



2,300



In 2018, Moldova had **more than 2,300 registered freelancers**. Almost 80% of platform workers there reside the country's capital, in Chisinau.

20% >

The majority of registered workers are male, with **less than 20% of the total being female**.



Levels of income for platform workers in Moldova **differ, depending on the type of work** and level of qualification.



Moldovans have also been active on **international platforms** such as inter alia Upwork, iFreelance, Toptal33, Freelancer.com, Upwork, Weblancer, FreelanceHunt.



\$ 17/h



\$ 29/day

Remote platform workers earn on average USD 17 per hour, while incomes of less qualified persons engaged in on-local work are **around USD 29/day**.



Yandex Taxi



Two international platforms, Yandex taxi and Glovo, have dominated the market, along with several other national/local level platforms, such as iTaxi, StrausMD, and iFood.



Straus.md was founded in Chisinau in 2014. The platform provides food delivery services for more than 250 restaurants.



iTaxi.md was founded in Chisinau in 2001. It is the first national platform that provides ride-hailing services.

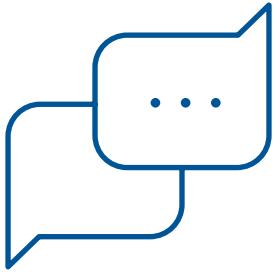


The issue of platform work was raised by the National Trade Union Confederation of Moldova during an event organised by International Trade Union Confederation. Conclusions drawn from this event point on a need to encourage better organisation of people involved in platform work.

There have been no legal proceedings in Moldova relating to platform work.



In 2019, 71% of Moldova's population had access to the Internet, although there was a significant disparity between urban and rural areas. The COVID-19 pandemic had a profound impact on digital connectivity in Moldova.



While the number of platform workers has been rising, there have not been active discussions addressing the issue of the employment status of platform workers in Moldova.



According to the National Trade Union Confederation of Moldova, current labour legislation in the Republic of Moldova does not utilise a concept like employment in the platform economy. Thus, **there are no specific measures designed exclusively to support platform workers**. Platform work in Moldova is regulated by framework legislation, specifically by provisions laid down in the Labour Code, Civil Code or Law on Entrepreneurship.

NORWAY

- ✓ ✗ Legally binding definition of online platforms
- ✓ ✗ Specific register of online platforms
- ✓ ✗ Specific regulation applicable to online platforms
- ? Online platforms are considered to be employers

There is currently no consensus on whether online platform companies are to be considered employers in Norway. According to Norwegian labour law, employment status is to be determined on a case-by-case basis. Platform companies vary in terms of the extent to which workers are dependent on, and subordinated to, the companies, the core criteria for determining employment status in Norwegian labour law.



+40



Norwegians have access to more than **40 remote work platforms** operating in Norway.



Between **0.5 and 1 %** of the population of working age are registered for work with the **Foodora platform**, whereas only **0.05 %** are registered for the **Upwork platform**.



Qualitative case studies of the food delivery and transport platforms reveal that **many workers are either migrants** struggling to find decent work in Norway, **or students** working part-time.



foodora



NOK 344,000,000



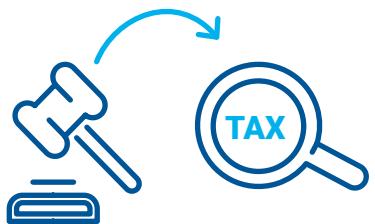
Foodora is the most popular and largest platform operating in Norway. The platform operates in 20 cities and cooperates with more than 2000 restaurants across the country.

In 2020, Foodora attained NOK 344 million in sales revenue.

In 2018, Foodora, which was owned back then by **Delivery Hero**, was acquired by the Dutch food delivery group **Takeaway.com**.



Takeaway.com



The issue of taxation – both at the level of companies and workers – is part of the public debate in Norway. Public services and governments as well as labour unions have expressed serious concerns that the international platform-based companies avoid paying taxes in the countries they operate through the use of tax havens. Since many of these companies use self-employed workers, there has also been a concern that platform workers do not report their income.



In 2019, the Norwegian parliament voted in favour of deregulating the taxi market by removing numerical restrictions on licenses and taxi owners' duty and right to be connected to a dispatching centre, and transferring qualification requirements from license-holders to drivers. Both labour unions and the Taxi Association (an association of taxi owners, an employers' organisation) have been very critical of the deregulation.

Immediately after the law went into effect in November 2020, Uber launched two new services in Oslo, Uber X and Uber Green. Removing the barriers also encouraged other platforms, such as Bolt, Yango and Viggo, to enter the Norwegian market.



In 2020, a government-appointed commission on the Norwegian labour market model and the future of work suggested revising the legal presumption, **making an employment relationship the default form of employment**.



In **2019**, a collective agreement between Foodora and United Federation of Trade Unions (Fellesforbundet) was signed after a five-week strike. Based on this collective agreement, couriers are entitled to an hourly wage of NOK 120, reimbursement for using their own equipment (bikes), extra pay during winter and a collectively agreed early retirement pension.

However, the car-based couriers working for Foodora are classified as self-employed and not covered by the collective agreement.



POLAND



- ✓ ✗ Legally binding definition of online platforms
- ✓ ✗ Specific register of online platforms
- ✓ ✗ Specific regulation applicable to online platforms
- ✓ ✗ Online platforms are considered to be employers

The amendments to the Road Transport Act came into force in 2021 (also known as **Lex-Uber**). Under the new rules, the intermediary is obligated to contract out passenger transport only to self-employed drivers (or drivers with fleet partners) who hold appropriate individual passenger transport licences. The law provides fines in the case of the intermediary operating without a licence, as well as drivers accepting orders from such an intermediary.



A study on new forms of work in Poland has concluded that **that 11% of the working age population have tried working via platforms**. Only 4% are engaged in platform work on a regular basis, however.



Platform work is more often performed by young people aged 18-24, followed by people aged 25-34.



> PLN 1,000
40% of platform workers earn under PLN 1,000 per month through platform work.



The Polish market is dominated by the national branches of international platforms, such as **Uber, Uber Eats, Bolt, Bolt Food, Free Now, Glovo, Wolt, and Pyszne.pl (Just Eat Takeaway)**.



In recent years, some local platforms have emerged in the food delivery sector.

Frisco.pl is an online supermarket that enables individuals to get fresh food and ingredients home-delivered.

SmartLunch helps big companies organise meals for their employees at the workplace. The company cooperates with 482 other companies, delivering lunches to about 65,000 employees.



There has not been much public debate over the employment status and working conditions of platform workers. Society's awareness of platform work is at a very low level. The debate is predominantly focused on international platform companies, Uber in particular, rather than on platform workers themselves.



Platform workers in Poland do not take part in collective bargaining – at any level. Platform workers are covered neither by multi-company collective agreements nor by company collective agreements. Overall, the union density in Poland is one of the lowest in the Central and Eastern European (CEE) countries, estimated at 12.9 % in 2019.



Several collective actions have been organised by Glovo couriers. The first strike took place in Białystok and the next three in Gdańsk. In each case, the reason for the mobilisation was related to unfavourable changes launched overnight by Glovo which had a negative impact on the level of couriers' remuneration.

In response to the strikes, the previous conditions were restored, however. Although stabilising the situation, the Glovo platform has once again attempted to institute changes to the detriment of workers.



There have been several court cases involving financial penalties imposed by the Road Transport Inspection due to infringements of road transport regulations.

None of these cases has been concerned with clarification of employment relationships or working conditions of platform workers, however.

PORUGAL

- Legally binding definition of online platforms
- Specific register of online platforms
- Specific regulation applicable to online platforms
- Online platforms are considered to be employers

Law No.45/2018, popularly known as the '[Uber Law](#)', defines an electronic platform, making reference to passenger transport services as platforms that 'organise and make available to interested parties the individual and remunerated mode of transport of passengers in unmarked vehicles.' The law also governs the employment status of individual platform workers and introduces a presumption of employment.



16%

Based on the COLLEEM survey, **nearly 16% of adult Internet users in Portugal have provided services via platforms at some time.**



Nearly as many women as men spend at least 10 hours a week working on platforms. The gender ratio depends on the sector, however, with transport and delivery services being dominated by male workers.

TOP 5

Portuguese workers are amongst the "[Top 5](#) in providing digital services" in creative and media technology, translations or software development for such platforms as Upwork and Freelancer.

Uber

Glovo

Uber Eats



Bolt Food



cabify

The market is dominated by international platforms for the growing transport and food delivery sectors.

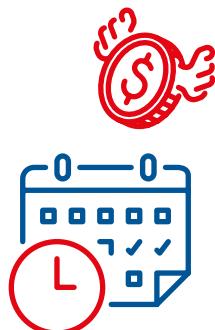
The most popular online platforms currently operating in Portugal are **Uber**, **Glovo** and **Uber Eats**, although other platforms such as **Bolt**, **TakeAway** and **Cabify** have entered the Portuguese market.



One of the Portuguese platforms, **EatTasty**, has been operating since 2016. The platform has also been successful in entering the Spanish market.



The accelerating ascendancy of platform work in Portugal has been largely attributed to economic decline as a result of the financial crisis. **Many people have started looking for alternative sources of income due to high unemployment rates.**



Qualitative studies suggest platform workers **face precarious working conditions** characterised by long working hours and unpredictable incomes. For example, newcomers working for Upwork need to invest more time and effort before they receive adequate remuneration for their labour. Some workers stated that it took them two years to earn a living wage. Many drivers work for different platforms at the same time. Some Uber drivers also use Bolt at the same time to obtain more clients and to earn more. The same is true of Glovo workers who also use Uber Eats.



In the public sphere, the platform economy is being discussed mainly in connection with the 'Uberisation' of different sectors and the future of the Portuguese social model.

Some policymakers have been in favour of introducing a 'third way' that could provide a status between subordinate employment and self-employed to terminate widespread 'bogus' self-employment. Bloco de Esquerda political party has submitted a preliminary proposal for changes in the Labour Code. The General Confederation of Portuguese Workers (CGTP) and the main employers' confederation immediately voiced their opposition to this proposal, however.

The government has been discussing the 'Decent Work Agenda' with political parties and industrial relations partners following publication of the Green Book on the Future of Work, which also includes provisions stipulating AI at the workplace.



There are no collective agreements at any level covering platform workers in Portugal.

The Trade Union for Urban Transport (STRUP) has made significant strides in efforts to represent Uber drivers by supporting talks, protests and strikes in the country.

The Association of Infelxible Precarious has also been active in lobbying for legislation in parliament in order to improve working conditions for platform workers.

The North and South trade unions for the restaurant and food industry have made some attempts to organise an information campaign in the food delivery sector, although mobilisation has been very difficult so far.

Many workers use informal channels of support. There are Facebook and WhatsApp groups, for example, that provide support on different work-related issues to many platform workers in Portugal.

ROMANIA

- Legally binding definition of online platforms
- Specific register of online platforms
- Specific regulation applicable to online platforms
- Online platforms are considered to be employers

Emergency Ordinance no. 49/2019 on alternative transport activities with car and driver was adopted by the Romanian government in 2020. The legislation is intended to regulate the national and international sector of ridesharing platforms and platforms relating to alternative transport activities. **This law was adopted to prevent tax evasion by ridesharing-related activities.** Income of online platforms registered in Romania is taxed under the Romanian Fiscal Code 227/2015.



55.8% of platform workers in Romania only **work around 10 hours per week.**



Romania has one of **the lowest number of workers employed via online platforms in the EU.** The percentage of foreign-born platform workers in Romania is also very low compared to other European countries.



5,000 active couriers
4,088 active couriers
33 cities 13 cities

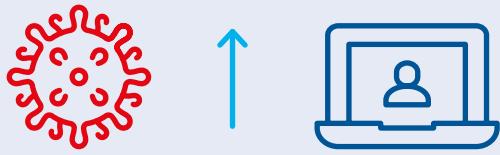
Transport services and food delivery are the most popular platform sectors in Romania and they are growing. The market is dominated by international platforms.

Glovo Romania has 5,000 active couriers in 33 cities, followed by **Uber Romania** with 4,088 drivers in 13 cities.

Five food delivery platforms - Hipmenu, Caserola.ro, Tazz, Bee fast, ChopChop - and one transport platform – Star Taxi - operate only in Romania.



Internet connectivity is the key challenge to the expansion of the digital platform labour economy. **Compared to other EU countries, the percentage of the population using the Internet is significantly smaller in Romania.** Most Internet users – and therefore platform workers – are concentrated in cities rather than rural areas.



As a result of the COVID-19 pandemic, work via online platforms has expanded in Romania. Even if platform work is associated with low income and a lack of a stable career over time, for many workers, online platforms have become a new source of income.



In the public sphere, the platform economy is being discussed as a new phenomenon. The media discourse has largely focused on promoting a positive image of the platform economy. In many cases, platform work in Romania is overestimated in terms of how much it fosters flexibility and autonomy compared to standard employment. **The discourse largely tends to neglect crucial topics relating to social protection, collective bargaining or working conditions of platform workers.**



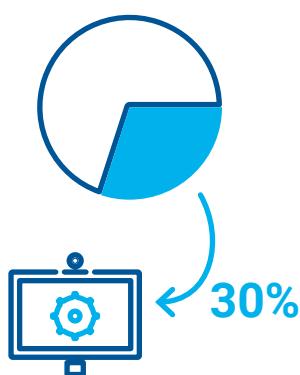
There is no collective agreement relating to platform work in Romania.

In **2020**, a group of couriers from Glovo organised a spontaneous action against the CEO of Glovo Romania, demanding inter alia transparency of information concerning the digital application and how the score of excellence functions, fair payment according to weather algorithms, waiting time and flexibility in choosing working hours as well as fair access to information from the assistance provided by Glovo Romania.

SERBIA

- ✓ ✗ Legally binding definition of online platforms
- ✓ ✗ Specific register of online platforms
- ✓ ✗ Specific regulation applicable to online platforms
- ✓ ✗ Online platforms are considered to be employers

Platform workers performing remote work, e.g. software development, copywriting, translation, data entry, etc., **are registered as independent contractors**, while platform workers working in the area of food delivery or passenger transportation tend to be sub-contracted through agencies or they are self-employed.



Platform workers performing remote work tend to be young and highly educated. **Software development accounts for 30% of the services provided**, followed by translation, copywriting, design and multimedia.



Serbia is among the **top 10 countries** in the world in terms of the total number of online freelancers.



Platform workers specifically involved in transportation tend to be **middle-aged men** with relatively long work experience and with secondary or higher education.



The Serbian market is dominated by **international platforms**, such as **Wolt** and **Glovo**.



Donesi (founded in 2006) was at first the only Serbia-based company operating in the food delivery sector. In 2019, **Wolt** and **Glovo** entered the Serbian market. **Donesi** was sold to **FoodPanda** in 2015, but without changing the name or business model. In May 2021, **Glovo** bought **Donesi** and transferred all of its customers to its platform.



Car:Go is another Serbian platform operating in the transport sector and was founded in Belgrade in 2015. The platform has around 200,000 customers.



Public discussion surrounding the rights of platform workers has been largely absent in the public discourse. Some non-governmental organisations have been attempting to initiate a discussion about platform work as a non-standard type of employment. Their outreach is often limited to a small group of professionals who are interested in this issue, however.



There have been no legal proceedings in Serbia relating to platform work.



Serbian freelance workers have organised themselves in the [Association of Internet Workers](#). The association has had several rounds of negotiations with government representatives regarding the disclosure of their income to the tax authorities.

A group of platform workers at Glovo tried to form a union, but did not succeed. They opened [a website](#) to exchange ideas, criticise working conditions and propose new solutions.

Two industrial actions have taken place in Serbia. In January 2020, individuals working for the Glovo platforms called a strike when their salaries were reduced.

Drivers for “Car:Go” organised a similar industrial action demanding payment of unpaid salaries. **The strike was only partially successful**, as workers received only a small portion of their unpaid income.

SLOVAKIA

- Legally binding definition of online platforms
- Specific register of online platforms
- Specific regulation applicable to online platforms
- Online platforms are considered to be employers

Under the **Income Tax Act - 595/2003** digital platforms are defined as hardware platforms or software platforms necessary to create and maintain applications through which transport and accommodation platforms offer their services.



3.1%

Platform workers account for 3.1% of the working population in Slovakia. Most platform work in Slovakia is performed as a secondary job and source of income.



12h /week

Workers in the transport and food-delivery sectors tend to be young males living and working in urban areas. Childcare, elderly care and household work are also performed by platforms, however; the workers are often women that have retired from their standard jobs upon reaching retirement age in order to earn additional income on top of their old age pension.

In 2017, Uber representatives reported that more than 40% of Uber drivers worked less than 10 hours per week. Similarly, Bolt reported in 2018 that only 20% of their drivers work full-time; while the average working time for the platform is 12 hours per week.



Uber **Bolt** **Wolt**
BlaBlaCar **Liftago**

The Slovak market is dominated by international platforms such as **Uber**, **Bolt**, **BlaBlaCar** and **Liftago** in the transportation sector, **Bolt** and **Wolt** in the food-delivery business and **Jaspravim.sk**, **Taskit.sk**, **Mikropraca.eu**, **Microjob.sk** in microwork and domestic services.



Domelia.sk is the most well-known and largest national platform for personal and household services.

The platform has been active in Slovakia since 2009, offering elderly care, care for persons with disabilities, childcare, private tutoring and cleaning services. The platform has more than 21,600 customers registered with it.



Public and expert discourse relating to the platform economy is focused on basic legal arrangements from the point of view of the customer and platform operation and have not addressed the employment status and working conditions of platform workers.

Trade union activity on behalf of platform workers in Slovakia is marginal. Upon the suspension of Uber transportation services in 2018, Uber joined the Republic's Employers' Union (Republiková únia zamestnávateľov Slovenskej Republiky, RÚZ SR). RÚZ SR is one of the four peak employers' associations with a mandate to represent employers in a national tripartite social dialogue. Perceived from this angle, Uber may technically be viewed as an employer.



Trade unions lack the capacity and strategy to represent workers who have non-standard employment status, including platform work.

There are currently no trade union initiatives to bargain on behalf of platform workers.



Slovakia has not had any specific court cases or suspected misclassifications of the employment status of platform workers to date. The Labour Court has limited competences in reviewing the employment status of platform workers, with these competences being strictly related to the definition of dependent employment contained in the Slovak Labour Code.

SPAIN

- Legally binding definition of online platforms
- Specific register of online platforms
- Specific regulation applicable to online platforms
- Online platforms are considered to be employers

In 2021, a law protecting delivery workers, known as the 'Rider Law', was passed. **The law stipulates that delivery workers must be considered employees and are therefore entitled to basic rights**, while representatives of workers must have access to the algorithms that organise workers' activities.



12,000,000
 12 million workers

Based on the COLLEEM II survey, **Spain has the highest rate of platform workers within the EU** - platform work is the main occupation for 2.6% of the population of working age.



Based on UGT studies, **a majority of delivery drivers in Madrid and Barcelona are migrants** with Venezuelan or Pakistani roots.

Other sources estimate that the number of people in the platform economy in Spain is far larger than previously believed and **may amount to 12 million workers**.



The Spanish company **Glovo** has dominated the food delivery sector along with other international platforms, such as **JustEat** and **UberEats**. At present, the Glovo platform covers 20 countries in Europe. Recently, the company was acquired by **Delivery Hero** (Germany).



In 2020, an American online freelance service platform - **Fiverr**, launched its Spanish version as a new step in its international expansion.



EUR 158,000,000

The UGT report «El trabajo en las plataformas digitales de reparto» **estimates that delivery platforms save up to EUR 158 million per year**: EUR 92 million in wages and EUR 76 million in social security contributions.



As the result of the COVID 19 pandemic, there was a 10% increase in the number of freelancers registered via platforms between March and June 2020.



The public discourse in Spain has predominantly focused on working conditions of workers in the food delivery and transport sectors. To date there have been almost 50 rulings in Spain concerning delivery drivers affirming that there is an employment relationship between the platforms and delivery workers.

In 2020, the Spanish Supreme Court (Judgment N. 805/2020) held that riders of a delivery company, Glovo, are employees and not self-employed workers or economically dependent self-employed workers. This Supreme Court judgment was crucial, as was adoption of the 'Rider Law'.

While the 'Rider Law' has been well received by social partners, several rider's associations acknowledge that the new legislation does not completely resolve workers' legal situation.



The Spanish unions have been very active in organising and advising workers. The UGT, in particular, has recorded a number of violations of workers' rights, such as arbitrary and unplanned dismissals, union-related persecution, restriction of the right to strike, spying, unrecognised accidents and unpaid work.

One collective agreement is in the process of being negotiated between the UGT and CCOO unions and JustEat. Since the company operates through «fleets», working conditions of the delivery workers depend on small, subcontracted companies.

Although the agreement has not yet been finalised, the JustEat platform has committed to hiring directly the entire workforce, providing the necessary materials for their work, e.g., vehicles, clothes, mobile phones, etc., and paying a fixed salary, overtime, night bonuses and holidays.

SWEDEN

- ✓ ✗ Legally binding definition of online platforms
- ✓ ✗ Specific register of online platforms
- ✓ ✗ Specific regulation applicable to online platforms
- ? Online platforms are considered to be employers

In 2020, the Swedish Work Environment Authority conducted a public inquiry into working conditions across 25 platforms. Two important recommendations were made to such platforms as TaskRunner and Foodora to improve management of workplace injuries as part of the attempt to recognise their employers' responsibilities.



The proportion of individuals performing platform work as their main job amounts to **less than 1%** of the employed population.



Some qualitative studies suggest that a considerable share of platform workers are **migrants with little prospects for regular employment**.



Platform work is **less frequent than in other European countries**.



Uber Eats



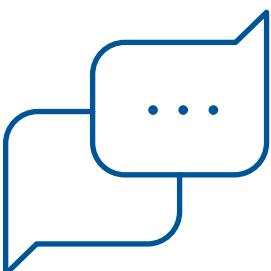
The food delivery sector is dominated especially by three companies:

Wolt, UberEats and Foodora, which was acquired in 2015 by **DeliveryHero**, the German multinational online food delivery company. In 2019, DeliveryHero also acquired a Swedish platform, **Hungrig.se**.

Among Sweden-based platforms, TechBuddy and Yepstr are the best-known work-on-demand platforms.

TechBuddy is a platform that provides personalised, on-site/at-home and office tech support. In 2021, TechBuddy acquired Taskrunner, another Swedish platform that specialises in the outsourcing of small jobs.

Yepstr is Sweden's largest platform for simple and safe teenage jobs, like babysitting, tutoring and dog-minding.



The public debate has mainly been focusing on working conditions, job security, decent pay, excessive control and surveillance, and collective agreements for platform companies in Sweden.

An investigative article by Breakit's reporter Erik Wisterberg has revealed that after working 7 shifts totalling more than 18 working hours, an UberEats delivery worker receives SEK 39 per hour before taxes.

2020



In 2020, a new trade association, Plattformsföretagen, which focuses on the platform economy, was launched.

The association has very few member companies, e.g., Besedo, Billfactory, Cool Company, Done, EPTI, Euro Freelancers, Gee, Gigger, Gigway, Gimlé, Konsultboken, Lingio, Marketplace Risk, Parkamo, Remotify, Simpell, Svenska Nomader, Taskrunner, UbiGo, WhereUare, and Workamo.

None of the top platforms based in Sweden have joined this initiative, however.



In **2018**, a collective agreement was signed by Bzzt and the Swedish Transport Workers' Union allowing Bzzt drivers to be covered by the Taxi Agreement.



In **2021**, a collective agreement was signed by the blue-collar union Transport and Foodora. The agreement lays down e.g., employment conditions, working hours and scheduling, wages, paid holiday, pensions and life insurance, and formally assigns competence to trade unions to represent employees in negotiations over the remuneration of work and other terms and conditions.



Two additional collective agreements have been signed by the white-collar trade unions Unionen and Instajobs as well as Gigstr, which allow workers to fall under the collective agreement for temporary agency workers.

TURKEY



- Legally binding definition of online platforms
- Specific register of online platforms
- Specific regulation applicable to online platforms
- Online platforms are considered to be employers

Online platforms are defined in a regulation governing e-commerce (Law No. 6563, enacted in 2014). According to this regulation, an “electronic commerce environment” means platforms such as websites or mobile applications where e-commerce activities are carried out and an “electronic commerce service provider” contracts or receives orders for the supply of goods or services in the e-commerce marketplace or in its own electronic commerce environment.



1,000,000

Although there is no reliable data on the number of platform workers in Turkey, the number of delivery workers is estimated to be **about 1 million**.



13-14h/day

The wage levels of moto-couriers is estimated at **slightly above minimum wage** with a 13-14 hour shift typically being worked each day.



Yemeksepeti (Delivery Hero) is the first and largest online food ordering site in Turkey; it was founded in 2001. It was acquired by **Delivery Hero** in 2015. The platform is used by 60,000 restaurants in Turkey and Cyprus and has more than 20 million registered users.

Uber

Uber entered the Turkish market in 2014. However, taxi drivers in Turkey sued UBER on the grounds that it was engaging in unfair competition. In 2020, the court lifted the blocked measure. The platform is active in some big cities such as Istanbul, Ankara, Izmir, Diyarbakır, Bursa, and Adana.



The effects of digitalisation on the labour market have been discussed extensively in the public arena. Labour unions in particular have been critical about working conditions for platform workers in Turkey. Several studies have been conducted by the trade unions Nakliyat-İş, Sosyal-İş, TÜMTİS and Tez-Koop-İş highlighting the interests of platform workers.



The Union of Tourism, Entertainment and Service Workers (TEHİS) and the Motor Courier Workers' Union (Moto-Courier-Sen) have been established in recent years. Both unions are directly focusing on the working conditions of moto-couriers.



One lawsuit was filed by the Tourism, Entertainment and Service Workers Union (TEHİS) in 2022 regarding clarification of employment status against a platform company owned by Delivery Hero in Turkey.



The TÜMTİS, Nakliyat-İş and TEHİS unions have carried out different organising activities for platform workers in Istanbul and Izmir.

In addition, various initiatives such as We Are at the Neck of the Bosses (Patronların Ensesindeyiz) have been active on social media informing people about working conditions of moto-couriers and efforts to achieve recognition of their union rights.

ACKNOWLEDGEMENT

We would like to thank all the experts who contributed to this project, as well as our colleagues at FES country offices. Their support was instrumental to make this project reality.

Armenia

Elen Manaseryan, Confederation of Trade Unions of Armenia

Austria

Robert Walasinski, international. Department Austrian Trade Union Federation

Belgium

Dr. Delia Badoi, Romanian Academy of Science

Bulgaria

Atanaska Todorova, Institute for Socials and Trade Unions Researches

Croatia

Jelena Ostojić, University of Zagreb

Czechia

Dr. Jan Drahokoupil, European Labour Authority

Denmark

Dr. Anna Ilsøe, University of Copenhagen

Estonia

Dr. Kaire Holts, Tallinn University of Technology

Finland

Dr. Maija Mattila

France

Odile Chagny, Institut de recherches économiques et sociales

Georgia

Vakhtang Natsvlishvili, Georgia Fair Labour Platform

Germany

Prof. Dr. Philipp Staab, Humboldt University of Berlin & Leonard Haas, AlgorithmicWatch

Greece

Dr. Maria Mexi, Geneva Graduate Institute

Italy

Dr. Marco Marrone, University of Venice

Latvia

Dr. Raita Karnīte, Economic Prognosis Centre

Lithuania

Dr. Inga Blaziene & Dr. Rasa Mieziene, Lithuanian Centre for Social Sciences

Moldova

Viorel Girbu, Independent Consultant

Norway

Sigurd M. Nordli Oppegaard, Fafo

Poland

Dr. Dominika Polkowska, Maria Curie-Skłodowska University

Portugal

Dr. Nuno Boavida, NOVA University of Lisbon

Romania

Dr. Delia Badoi, Romanian Academy of Science

Serbia

Dr. Svetozar Tanaskovic, University of Belgrade

Slovakia

Dr. Marta Kahancová, Central European Labour Studies Institute

Spain

Felipe Diez Prat, Unión General de Trabajadoras y Trabajadores

Sweden

German Bender, Arena Think Tank and Stockholm School of Economics

Turkey

Emirali Karadoğan, Tez-Koop-İş Union

Graphic designer of Factsheets: Galadriel GV

IMPRINT

Published by Friedrich-Ebert-Stiftung |
Competence Centre on the Future of Work |
Cours Saint Michel 30e | 1040 Brussels | Belgium

Matthias Weber, Head of Friedrich-Ebert-Stiftung
Competence Centre on the Future of Work

Responsible Contact:
Oliver Philipp
oliver.philipp@fes.de
Dr. Inga Sabanova
inga.sabanova@fes.de

For more information about the Competence Centre on the Future of Work, please consult:
<https://www.futureofwork.fes.de>

Design: Barbora Novotna / Galadriel GV

The views expressed in this publication are not necessarily those of the Friedrich-Ebert-Stiftung. Commercial use of media published by the Friedrich-Ebert-Stiftung (FES) is not permitted without the written consent of the FES.

Commercial use of all media published by the Friedrich Ebert Stiftung (FES) is not permitted without the written consent of the FES

ISBN: 978-3-98628-353-7

© 2023



www.fes.de/bibliothek/fes-publikationen

