



MAPPING PLATFORM ECONOMY

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- FES Future of Work
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FES Future of Work initiated a research project – **Mapping Platform Economy** in 2021

Aim: to capture the existing platform economy landscape and sheds some lights on the complexity of platform ecosystem by providing visualisation of several regulatory aspects of platform work at the national level by focusing on :

- Definition of online/digital (labour) platforms
- Existence of national register for platform companies
- Recognition of platform workers as employees
- Specific regulations for protection of platform workers
- Collective agreements either at sectoral, regional or company levels
- Court cases relating to the employment status.

Methodology: Secondary data available at the national level (academic studies, policy reports, grey literature, national statistics etc).

Projects output

Between October, 2021 and January, 2022, the data was collected for 30 countries:

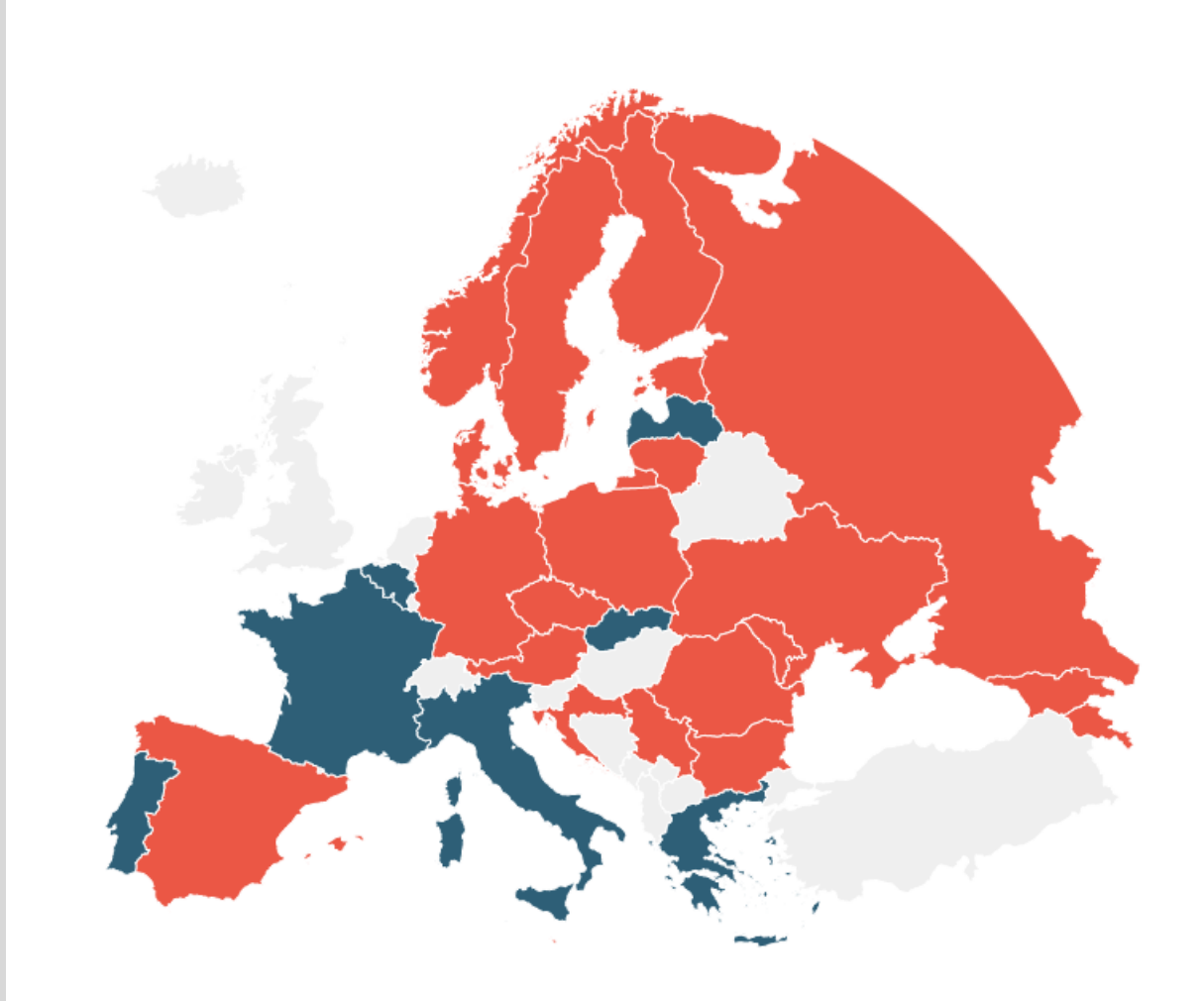
22 EU member states: Austria, Belgium, Bulgaria, Czechia, Croatia, Denmark, Estonia, Finland, France, Germany, Greece, Latvia, Lithuania, Malta, Italy, Poland, Portugal, Romania, Slovakia, Sweden, Slovenia, Spain

8 countries outside the EU: Moldova, Norway, Ukraine, Russia, Armenia, Georgia, Serbia and the US.

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- Six interactive maps with yes/no answers
 - 30 country factsheets
 - Project report
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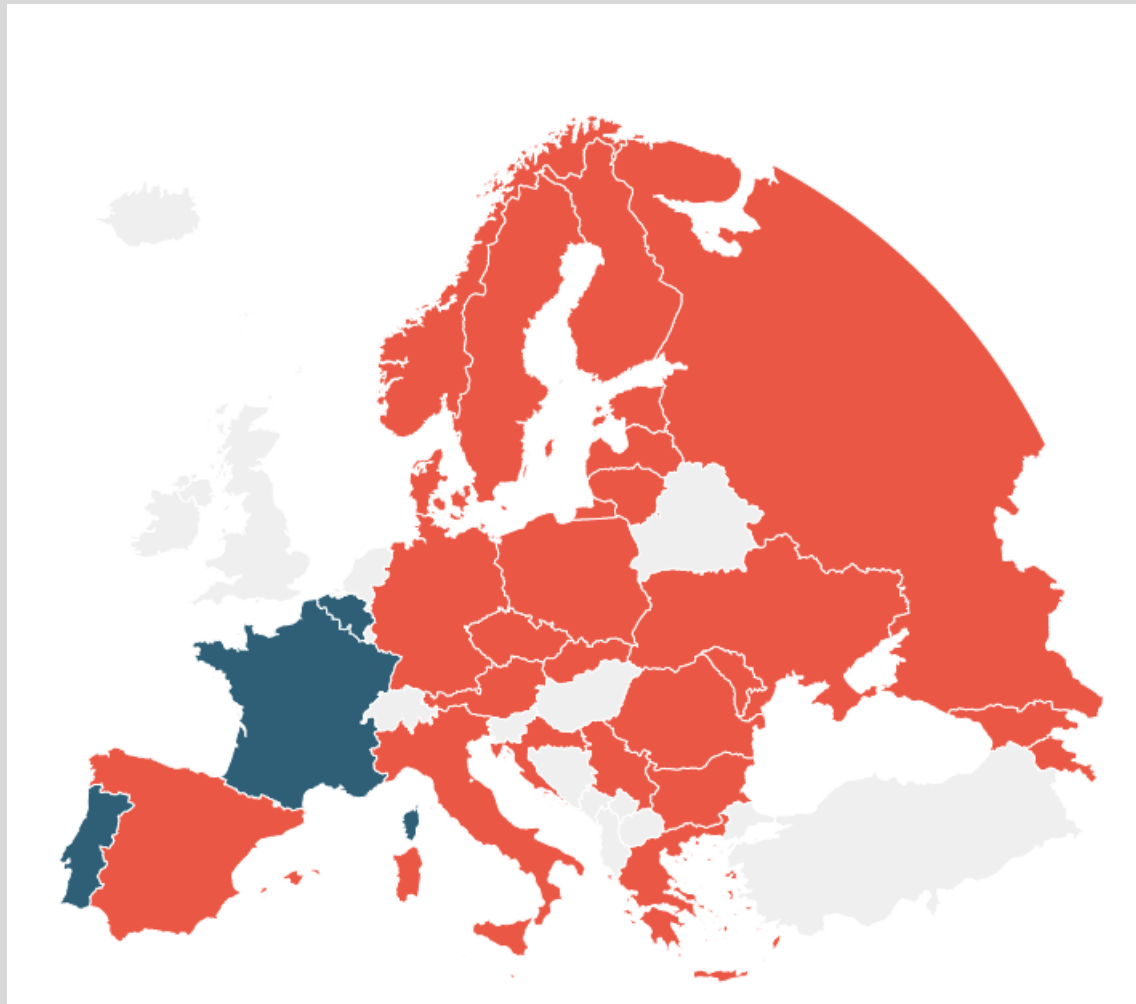
Interactive map (1)

Definition of online/digital (labour) platforms



Interactive map (2)

Existence of national register for platform companies



Country Factsheets

Online Platforms and Platform Work 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.

€ 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.



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



Most popular platforms in Germany:



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.



Online Platforms and Platform Work Norway

- ✓ ~~✗~~ Legally binding definition of online platforms
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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.**

fodora

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**.

Online Platforms & Platform Work: The Complex European landscape

By Inga Sabanova and Delia Badoi

- The scope of the report goes beyond the current debates on the proposed directive
- Two important analytical assumptions:
 - (1) Platform work is just a type of work
 - (2) Ongoing platformisation of deregulated sectors of economy:
 - The Covid-19 pandemic
 - Previous economic crises
 - Multiple sectors of economy, e.g. cleaning, care etc.
- However, to progress the debates on workers' rights in platform economy, we need to understand the ecosystem of platforms

Platform Companies

- No legal definition of platforms
- Many platform companies emerge as start-ups, then expand, get taken over by other companies or change their physical location by moving their headquarters to another country.
- Operate across borders without formal registration and specific tax obligations
- Little is known even about big multinational/international companies themselves, however, except the limited information available on the private-company data Crunchbase website, company reports and blogs
- E.g. Foodora, Glovo, BOLT Food, Rocket

national registries are required

Platform Work

- The tasks performed through platforms is not new (e.g. the scale of tasks, the format of service provision, the level of skills required, the process by which the client is matched to the worker (offer of work versus competition) and the party that is in charge of assigning the work)
- Forms of subordination both physical and digital introduced by platforms
 - (1) intermediate companies mirrors the development observed in other standard precarious low-paid jobs across different sectors in Europe
 - (2) the use of algorithmic management creates a totally new field for contestation

cross-platform comparisons and evaluations are required

Platform Workers

platform work as a highly gendered and racialised field

- “without migrant labour, there would be no gig economy as we know it” (Altenried, 2021: 3).
- In the Nordic and other Western European countries such as Austria, Germany, Spain, France, Italy or Ireland, platform work, especially in the food delivery sector, is often performed by migrants. For example, the share of migrants working for platforms amounts to nearly 50% in Ireland, 36% in Finland and 26% in Sweden.
- women’s participation in platform work has been increasing since the early 2000s, with significantly more growth among women than men
- women are usually involved in doing on-location jobs that require physical work, especially in such low-skilled sectors as cleaning or caregiving platforms

addressing intersectionality in the trade union work

Thank you!

For more information about the project

<https://futureofwork.fes.de/our-projects/mapping-platform-economy>

@FES_FoW

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