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# A HELL OF A RIDE

The Prospects of Decent Work on Digital Delivery and Ride-hailing Platforms in Serbia



**Branka Andjelkovic / Tanja Jakobi / Maja Kovac / Slobodan Golusin**



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# **RIDERS ON THE STORM**

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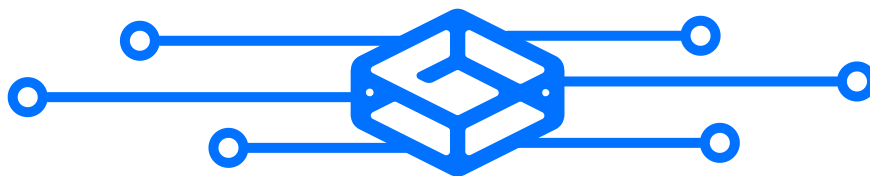


# PART ONE – CONCEPT AND CONTEXT

## 1. Introduction

The past decade has seen a global explosion of work in the platform-based economy. Platform-mediated work has infiltrated all spheres of economic activity and fundamentally altered understanding of labour and employment. Like many other countries, Serbia has not escaped this growth in platform work. Firstly, Serbia has one of the world's largest per capita pools of remote workers on global online platforms (Andjelkovic, Sapic, & Skocajic, 2019), with tens of thousands of online freelancers (e.g. Upwork, 2020). However, there has also been a significant expansion of other types of platform working, such as on-demand work in food delivery or ride-hailing services via mobile apps. As shown by most recent CENTER's study (2020) these mobile apps already boast more than 360,000 users in Serbian cities where they operate (Nis, Novi Sad, Kragujevac, Belgrade, Pancevo, and Subotica for delivery apps, and Belgrade only for ride-hailing). Covid-19 and lockdown measures have boosted the usage of delivery apps, bringing in new customers and increasing demand from current ones, and so prompting job creation.

Platforms are generally described as 'two-sided' and/or 'multi-sided' online markets which facilitate transactions or, at a minimum, interactions between numerous independent groups, in which at least one but usually all benefit directly or indirectly from having a growing number of users on the other side(s) (Hagiu & Wright, 2015; Martens, 2016). The platforms operate through a lean business model, which means hyper-outsourcing of company functions such as fixed assets, workers, maintenance costs, and training. They are primarily focused on controlling the platform that enables extraction of digital rent (Srnicsek, 2016).



This novel business model treats workers as independent contractors rather than employees, thus circumventing social protection rights usually guaranteed to those with standard working contracts (e.g. Aloisi, 2016; De Stefano 2016; Scholz, 2016; Vallas & Schor, 2020). In addition, working on these platforms involves the externalisation of fixed assets to workers. They usually work irregular hours dependent on customer demand and are paid at a piecemeal rate (Stewart & Stanford, 2017). The work is arranged by algorithms rather than humans (Aloisi, 2016), with mobile apps instead of workers generating demand for work (Goods, Veen & Barratt, 2019). It is characterised by low skill requirements and automatized tasks performed on location and is often referred as 'work on demand via apps' (De Stefano, 2016) or 'on-location platform-determined routine work' (De Groen, Kilhoffer, Lenaerts & Mandl, 2018). This study will also refer to this type of work as 'blue-collar platform work' throughout.

The model of operations utilised by digital platform companies is widely considered to be

pushing workers into a vulnerable socio-economic position and away from internationally recognised labour standards as enshrined in the Decent Work Agenda (ILO, 2020). This is particularly characteristic for food delivery and taxi services organised through platforms (De Groen et al., 2018). As such, blue-collar platform work generally lacks the features of decent work, unlike white-collar platform work ('crowdworking'), which provides somewhat better opportunities for decent work, such as above-average earnings, greater work-life balance, and opportunities for skills development and learning (Andjelkovic et al., 2019).

The debate about on-demand platform work via apps is currently largely confined to the context of developed countries (e.g. Drahokoupil & Piasna, 2019; Goods et al., 2019; Huws, Spencer & Joyce, 2016). In contrast, evidence on the position of blue-collar platform workers remains scant in the developing world. This calls for greater accumulation of knowledge within this field in the different national settings of middle-income economies.

This study intends to close this gap and set the scene for discussion about the position of on-demand platform workers in Serbia while comprehensively investigating the characteristics of on-demand platform work via mobile apps through the lens of the Decent Work Agenda (DWA). This pioneering study complements previous research on the remote workers via online platforms (crowdworkers) produced by CENTER (e.g. Andjelkovic et al., 2019; Kovac, Andjelkovic & Jakobi, 2020).

## 2. Research approach

The goal of this study is to uncover the ways in which the characteristics of blue-collar platform work in Serbia mesh with the International Labour Organisation DWA (ILO, 2020). The concept of decent work involves the provision of opportunities for productive work and decent pay, workplace and employment security, social protection for workers and their families, opportunities for personal development, freedom for workers to participate in social dialogue and self-organise, as well as equal access to opportunities (ILO, 2020). Decent work has been recognised as a universal objective and international standard for fair employment, and has been included in many key UN instruments on human rights and sustainable development (ILO, 2007).

In this study, blue-collar platform work is analysed through the following six dimensions of the decent work framework: decent working time, decent pay, security, social protection, social dialogue, and competency and career development (ILO, 2007). These dimensions are adapted to the inherent nature of platform work in general, including concrete data obtained through empirical research. **Decent working time** refers to working arrangements which enable a balance between one's job and the demands of the family and life outside of work. This means regulated working hours, daily and weekly rest periods, and vacations, which together do not adversely affect workers' physical and mental health. In the DWA, **decent pay** is defined as fair compensation for work which ensures essential well-being for workers and their families. Moreover, decent pay concerns not only basic income, but also requires profits are distributed in a way that does not exacerbate income inequalities between workers and owners of capital. In this paper **security** is defined as

occupational safety and health, which entails preventing accidents and diseases, as well as stress and violence which endanger workers' well-being and capacity to work. **Social protection** consists of all measures that provide income security to people who face unemployment, sickness, disability, old age, and access to essential social services. This study focuses on social and health benefits (such as healthcare, disability benefits, pension, paid vacation, maternity/paternity leave, and unemployment benefits) stemming from standard employment contracts. In the DWA, **social dialogue** is understood as negotiation, consultation, and information exchange between representatives of governments, employers, and workers. Due to the nature of this research and the structurally weak position of workers in the platform economy, the study focuses on the capacities of workers to negotiate their working conditions in this tripartite relationship. The **skills and career** dimensions of decent work are defined in this research as the extent to which employers provide skills development for workers and permit them to have fulfilling careers. This is important for both the competitiveness of workers in the labour market and their overall productivity, as well as their well-being and self-actualisation.



Methodologically, this research employed a qualitative approach based on semi-structured interviews and focus groups. Interviews were organised with Belgrade-based workers associated with three delivery platforms, Glovo, Donesi, and Wolt, as well as one ride-hailing platform, CarGo. Although several other platforms were active in Serbia, these four were selected because they were leaders in the local market. Interviews were conducted with 13 couriers with the delivery platforms and 9 drivers for CarGo. In total, there were 20 male and 2 female interviewees. The selection criteria for interviewees reflected the differences in the platform worker population in terms of company affiliation, type of employment, full or part-time engagement, type of vehicle used, and demographics. The sample of interviewees was constructed using the snowball sampling technique. Each interview lasted on average between 45 and 60 minutes.

In addition, two focus groups with delivery workers were organised in Novi Sad and Nis, as these two cities, together with Belgrade, were the leading markets for online delivery (and ride-hailing). The aim was to address regional similarities and differences and enable in-depth investigation of emerging themes identified in the interviews. The focus group discussions additionally enabled comparative analysis of findings on the elements of the DWA in different local settings. A total of 9 platform workers participated in focus groups in the selected cities, of which 8 were male and 1 was female. The participants in the focus groups in both cities worked for Glovo, Donesi and Wolt (in Novi Sad only).

Coding of the content of the interviews and focus groups was guided by the decent work concept framework. Atlas.ti software was used for this analysis.

The following sections of the paper discuss the findings of the qualitative part of the re-

search on the prospects of decent work in blue-collar digital work in Serbia. Firstly, an overview of the selected platforms and the services they provide is given, including the relations between platforms, intermediary employers,<sup>1</sup> and workers. The subsequent section discusses the structure of the platform workforce and the types of employment contracts, followed by an analysis of decent work dimensions in blue-collar platform work: working hours, decent pay, employment security and security in the workplace, social protection, possibilities for social dialogue, and competency and career development. Finally, the conclusions reflect on the positions of blue-collar platform workers in the Serbian context.

## Limitations

The research was constrained by three factors. Firstly, Kragujevac was selected as a representative city for this research, but the workers of the only platform that operates there (Donesi) were unable to take part in the focus groups as the management denied permission. However, geographical representativeness was still achieved through participation of platform workers from Novi Sad and Nis. Secondly, the response rate of mapped interviewees to focus groups in Nis was relatively low. The focus group was carried out with 3 participants (out of sixty delivery workers in the city). Finally, the dynamics of the interviews and focus groups were affected by the current Covid-19 pandemic. While some interviews were held in person, the majority took place online via a video-conferencing application. This factor did affect the interviews and focus groups to a degree but allowed a safe research environment.

## 3. Selected platform companies: a brief overview

This research focuses on workers affiliated with three delivery platforms and one ride-hailing platform, selected due to their leading role in the local market.

**Glovo** is a Spanish start-up company, founded in 2015. It allows shops and restaurants to sell their products through the Glovo app. This firm has more than 51,000 couriers in 22 countries. Glovo entered the Serbian market in 2019 and has since offered a food delivery service, alongside the delivery of products from grocery shops and pharmacies. Glovo couriers deliver using cars, motorcycles, and bicycles, as well as on foot. The company is registered in Serbia as an IT consulting firm (Business Registers Agency, 2020).

**Wolt** is a Finnish food delivery company founded in 2015 and active in 15 countries in Europe. It is one of the fastest growing and best-rated food delivery apps. This company has been active in Serbia since 2018, where it operates in Belgrade and Novi Sad. Wolt is registered as a marketing agency with the Serbian company register (Business Registers Agency, 2020).

**Donesi** is a company founded in Serbia in 2006 as a food ordering and delivery web site. It has been operating as a delivery app since 2014. Donesi is now owned by Delivery Hero, one of the world's largest food delivery platforms. The company is active in 20 cities in

<sup>1</sup> Defined below at page 8.

Serbia, Bosnia and Herzegovina, and Montenegro. It is registered as a marketing agency (Business Registers Agency, 2020).

**CarGo Technologies** is a platform company founded in 2015 in Serbia. CarGo mostly operates as a ride-hailing firm, although it has been offering food delivery since October 2020 through its Butler service. Apart from Belgrade, the company operates in Paris, Vienna, and Zurich, according to its website. This study focused only on workers who provided ride-hailing services, as Butler became operational only after CENTER's research was completed. CarGo Technologies is registered in Serbia as a civic association (Business Registers Agency, 2020).

Other similar ride-hailing companies (e.g. Bolt) were inactive although they had been registered in Serbia for several years. Other companies (such as Alideda) provided only delivery of telephone orders.





# PART TWO – RESEARCH RESULTS AND ANALYSIS

## 1. Who are the workers?

This section describes the composition of the blue-collar platform workforce based on the demographics of the sample and interviewees' estimates. It also presents the various types of engagement with the platform work and general trends in the turnover of these workers.

**The workforce** on the analysed platforms is quite diverse in terms of age, education, previous working experience, and current platform experience. When asked about the different demographic backgrounds of workers, the interviewees noted that 'People of all profiles work here, there are no rules.'

The interviewed platform workers were **aged** between 21 and 63, with the majority in their 30s and 40s. The interviewees noted those in their 20s usually did part-time work more frequently and often delivered by bicycle or on foot. Although there was no set age limit on delivery platforms, CarGo did not employ individuals under 25. Middle-aged men mostly had their own cars and platform work was their primary job.

Moreover, the results revealed the majority of platforms workers were **male**. Only three women were represented in the research sample. In general, the interviewees knew of only a few women in delivery work, and even fewer in ride-hailing. Due to the lack of data, it is unclear how gender relates to the experience of working on these platforms.

Most of the interviewees were secondary school graduates. However, several held university degrees or were university students. The respondents indicated that people with a variety of **educational qualifications were represented** on the platforms, even though it was difficult to establish an exact pattern. Still, as one of interviewees (who was a lawyer) noted, 'I am one of the rare people here with a university degree. Most of the people here have only high school diplomas.' One interviewee explained his view of the relationship between education and this work: 'This is supposed to be a job for high school kids, but as the earnings are great for our circumstances, people with university degrees also come to work here'. Most of the interviewed workers spoke English, and some also spoke other languages. The respondents reported having completed various non-formal education and training programmes, ranging from craftsmanship and driving to retail, tourism, and management, including IT courses.





The workforce is also quite diverse **in terms of working experience**. Many delivery workers reported having had experience with courier work, but also reported having worked in retail, services, law enforcement, public administration, management, construction, manual labour, marketing, teaching, IT, etc., or having been sole traders. In contrast, many of those who work for CarGo were former professional drivers, a key reason that led them to take on this work. Total working experience varied from several months to 20 years. Significantly, none of the interviewed workers reported longer periods of unemployment, meaning they were a fairly active working population, with many holding multiple jobs simultaneously.



Some couriers reported they were currently working **more than one job** at the same time, although platform delivery was the only source of income for the majority. Those with other jobs worked in schools, did online freelance work, and offered private rides and deliveries. Some worked on two or three platforms simultaneously to obtain enough work and maintain job opportunities. As one courier explained, 'I did not want to close any doors for myself, so I drive for all three platforms because if you are inactive for a certain period, they take you off, and after that, it is hard to come back.' Drivers, on the other hand, worked solely through the platform, as recent company regulations first actively discouraged and ultimately prohibited part-time work.

Most of the interviewees worked or had worked for these companies for rather **brief periods of time**. The majority of the CarGo drivers interviewed (in August 2020) had stopped working for CarGo in the previous months due to the company's workforce reduction policy. On average, they reported having worked for CarGo for 6 months, while almost none had worked there for more than a year. The delivery drivers pointed out that they had been engaged on platforms for an average of 6 months. This comes as no surprise as the platforms themselves were new to the delivery and ride-hailing markets, which directly impacted the time spent working for them. However, the findings indicated that some of the couriers had worked for longer periods of time but on different platforms. In general, interviewees reported that people rarely stayed long in this line of work and that there was 'constant worker turnover'.



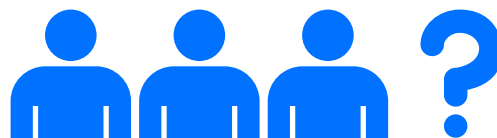
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For example, one reason for turnover in ride-hailing services was the continuous changes of technical criteria and vehicle age specifications. There have been several rounds of these changes, with the most recent ones specifying that only cars made in 2019 or later could be used for ride-hailing with CarGo. All the decisions had been made hastily and without timely notification, leaving many drivers unable to continue working. Some had taken on debt to purchase a car which was then rendered useless for work by the ever-changing regulations. This is why the lack of stability seemed to be one of the main issues for those engaged by CarGo. As one worker put it:

*"This instability makes me think about quitting. Changes are constant, every two months. There is no continuity on which a person can rely on, I don't know whether this system of rewards and pay will be there in the next year. I can't make a business plan at all."*

Couriers also feared changes to some extent. According to one respondent, 'I don't expect our pay and conditions will stay like this in the following months.' Turnover was, therefore, caused not only by workers' own motivations and the nature of the work, but to a large extent by the decisions imposed by the platforms.

**The number of workers** on these platforms was mostly unknown to the interviewees. Those who worked for Donesi and Wolt were unable to estimate the number of their peers, although they assumed they numbered in the hundreds. Two Glovo couriers reported they had recently learnt Glovo employed some 900 workers, of which around one-third were active, with on average 50 workers active per hour. For CarGo, these numbers ranged from several dozen to several hundred at different times.



On the other hand, well informed sources put the number of workers registered on the leading three food delivery platforms at around 3,000. Belgrade was the leading market for online delivery and most workers were based in the capital. Novi Sad was the second largest market, with an estimated 100 active workers per day, while the figure for all platforms active in Nis was about 60. As such, at the time of the survey online delivery services in Serbia had a workforce of some 3,500 in total including the drivers for the CarGo ride-sharing service.

In conclusion, the blue-collar digital workforce in Serbia seems quite diverse. People of various ages, as well as educational and professional backgrounds, work for delivery and ride-sharing platforms. Nevertheless, very few women do these jobs. The typical interviewee was most likely to be a middle-aged man who mainly worked full-time on these platforms. However, there were also students, pensioners, and individuals with other jobs who only did platform work part-time. Generally, the workers did not stay long on the platforms and there was substantial turnover, largely caused by the companies' policies.

## 2. Who are the employers?

One of the key questions yet to be answered for the platform economy is the identity of the ultimate employer. The answer remains elusive as platform companies, in general, pursue a hyper-outsourced model in which they employ only core staff, while drivers and couriers are sourced through intermediary companies or are self-employed. As such, these individuals are not employed by the platform companies, and the employment relationship is quite complex (e.g. Aloisi, 2016). The same model was also observed in this research, and it is one of the most prominent research findings that will be discussed in the following chapters.

All **platform companies** examined focused on managing their apps and providing branded equipment for their workers. The platforms set the rules in the workplace, which also included managing workers' rates and resolution of issues through the apps. The workers had next to no interaction with platforms, except for the rare contact with the management when rules and regulations change. The platforms provided support for operational issues workers encountered in the field. Workers could contact platforms' support services by either e-mail or telephone.

Moreover, delivery companies conducted recruitment and provided induction training for new hires, whereas CarGo outsourced this task to an intermediary agency. Finally and crucially, platform companies profited from the work done by drivers and couriers, also keeping records of work done and remitting funds for payment of wages by intermediaries, but did not contract the workers directly.



By contrast, it was **intermediary agencies or sole traders (self-employed individuals)** that entered into contracts, interacted with workers, and mediated the payment process. This organisational structure was portrayed as follows:

*"You don't communicate with Glovo, you have everything on the platform. It's a phenomenal system, they're not to blame for anything, you work for another company which again isn't aware of any irregularities. They just get money from Glovo, take a percentage, and give you the rest. So even if you want to complain, you don't know who to."*

CarGo seems to externalise payments and interaction with workers to intermediaries to an even greater extent:

*"CarGo doesn't have anything to do with us. We get a contract from a sole trader who has a company. They don't contact us at all. The sole trader checks on us, we have meetings with him, he controls the vehicles and everything. Of course, under the instruction of CarGo. They have meetings with him and then he has meetings with us."*

Thus, although intermediaries were the formal employers, it appears that platform companies set working conditions in the overwhelming majority of cases.

These intermediaries can be established either as labour sourcing agencies with hundreds of employees or as sole traders with only a handful of staff. Moreover, any individual can register to work for a platform as a sole trader (i.e. self-employed), which findings indicate some did do. Workers were paid through intermediaries, a service for which they paid a fixed fee. Platform companies paid gross earnings for all workers employed through each intermediary and provided lists of their individual earnings calculated through the app. Intermediaries then distributed these earnings to individual workers. Glovo required intermediaries to be registered as courier companies. Other platforms, however, entered into contracts with intermediary companies from a variety of sectors, mostly those registered as legal entities eligible for tax breaks, such as for instance printing shops. Large courier and driver agencies employed hundreds of workers active on different platform companies. The interviewees also reported receiving payments through their peers registered as sole traders, who were often themselves drivers. One courier explained the rationale for these enterprises:

*"If I opened my own courier company, it would cost me RSD 33,000. That is way above what one person can earn doing this job. One person opens a company and employs five more people there and takes a percentage of their wages. Then it pays for everyone."*

Due to these arrangements, intermediaries ultimately bore the legal risks related to contracts, including taxes, while platform companies were legally not liable for any of these. As one CarGo driver pointed out:

*"Sole traders are subsidiaries of CarGo. They protect CarGo when the tax inspection arrives because CarGo is clean then. The sole trader is responsible for everything. Tax inspection goes after him as the company owner."*

Another type of delegation of responsibilities was visible in situations where third-party courier companies used a particular mobile app, but employed workers independently. In these cases, the companies provided cars and fuel, but also paid fixed wages, independent of the rates set by the platforms. Focus groups participants from Novi Sad and Nis confirmed these findings and the role of intermediaries.

Furthermore, the **hiring** of workers by the platform companies is characterised by low barriers to entry. The workers were not required to possess any specific qualifications to join, except driving skills, including a valid driving licence. A respondent who worked for two companies explained this:

*"I went to the first interview and they told me about the working conditions. At Glovo they just asked for a driving licence, required me to have my own car, and wanted an official certificate proving I'd never been criminally convicted. Donesi used the same process."*



This was confirmed by another courier: 'It's a job for the less-qualified workforce as it's only necessary to have a phone and know how to drive.' Workers usually applied for jobs by e-mail or telephone, the vast majority relying on the experience of networks of friends who had previously worked through the platform. Workers were usually hired in a group recruitment process where they were given brief training on how to use the app and contact support.

Although entry barriers are low at all the companies examined, their **demand for workers** differed. Some companies had an open hiring approach, where they continuously hired staff, while others were closed to new applicants. Interviewees reported that Wolt and Donesi rarely hired new workers through open vacancy advertisements. At the same time, these platforms were seen as the most prestigious, as they offered better working conditions. Glovo, on the other hand, was reported as having significant turnover. This company was constantly hiring new couriers, while large chunks of the workforce were regularly leaving the platform due to dissatisfaction with the poor working conditions.

CarGo recorded the highest turnover rate. In the words of an interviewee:

*"In 2018, when CarGo expanded, they hired 500 drivers in three weeks and killed our job... The structure of these workers is miserable, mostly those who can't find any other sort of job, with appalling cars. For example, they use a Golf 6 to pass their vehicle inspection and then regularly drive a Golf 4. A huge number of them were kicked off the app because they broke so many rules and then new drivers were constantly taken on. They literally made a student zadruga. "*

Another driver referred to a cut in the workforce due to the pandemic: 'In April [2020] they just started cutting the number of drivers because of the surplus of workers.'

Thus, although platform companies captured surplus value, distributed wages, and exercised control over both workers and intermediaries and obliged them to use their brands, they were formally not employers. Staff were employed by either large labour sourcing agencies or sole traders who were former or current platform workers. This was the fundamental triangular relation that dictated the nature of employment and the position of workers in the platform economy, and serves as a base for understanding the dimensions of decent work presented in the following chapters.

### **3. Contracts and labour status of workers**

As discussed in the previous section, couriers and drivers who worked for platforms were not formally employed by these companies. Rather, they were engaged either as sole traders (self-employed) or by intermediary agencies or other sole traders. Importantly, many workers were not formally employed at all, because companies, except for CarGo and, more recently, Glovo, did not require all workers to have employment contracts. The contractual relationship is ultimately a matter of agreement between workers and intermediaries. Still, those who were contracted by intermediaries had to pay a service fee (for facilitating and transactions services) that ranged from 3 percent of total earnings at CarGo to between 5 and 15 percent on the delivery platforms. As the Serbian legal frame-

work does not seriously address platform work (Jasarevic & Bozicic, 2020; Andjelkovic & Sagic, 2020; Kovac et al., 2020), this variety of types of employment leads to the myriad **different work contracts** that regulate working for platforms.

Firstly, some of the workers were **self-employed** as sole traders. Self-employed workers paid lump-sum tax depending on their registered address and enjoyed safe social protection benefits through fiscal arrangements. These individuals had the right to employ other workers. Yet, as findings show, a number of workers were paid through other self-employed individuals but remained without employment contracts. In this case, they had to pay the service fee as described above.

Furthermore, the majority of those that had some sort of formal employment contract were employed by **intermediary agency**. CarGo drivers mostly had fixed-term employment contracts with intermediary agencies under the following arrangements: 'Fixed term contract for three months at the minimal wage. Everything above that is paid in cash.' In general, the three-month contracts were regularly extended.

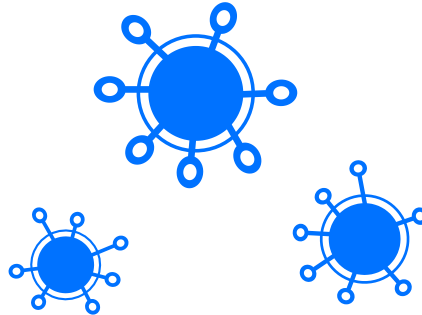
Moreover, as findings suggest, a significant number of workers' contracts with intermediary agencies fell under temporary work regulations that allowed only a limited number of working hours per week. However, this was rarely respected, as most of these individuals worked very long hours which officially did not count towards their wages. This indicates they faced poor safeguards due to their irregular working arrangements. Still, importantly, the majority of workers who were employed (or legally contracted), as was confirmed by both interviews and focus group participants, understood neither which type of contract they had signed, nor the rights and obligations it entailed. This created a wealth of opportunities for abuse.



As research testimonies show, the vast majority of delivery workers in three cities were not registered as employees at all (neither through intermediaries nor as self-employed), and so remained without any contract. They received their wages from intermediary agencies to which they only paid the service fee. However, as suggested by findings from the field, a significant portion of workers were not eager to formalise their status as this imposed additional costs in the form of taxes they were not willing to pay for a variety of reasons. 'None of us is employed, we just get money through some sole traders. I haven't signed anything and I give 8 percent just to get money from them, it's completely illegal.' Other reasons for staying under the radar of legal employment included, for example, already having a formal job or being retired. The findings thus mean that the majority of platform workers still preferred short-term financial gains instead of social safeguards and other rights guaranteed by employment contracts. This was also widely confirmed by the focus group participants in Novi Sad and Nis.



However, an emerging trend of formal **employment** of platform workers has been identified. CarGo and Glovo made formal employment mandatory during the lockdown. One CarGo driver offered an explanation: 'CarGo works through their intermediary firms and make it a requirement for them to formally employ each of their workers.' Similarly, 'At Glovo they just started to register everyone, you cannot activate your app without it.'



According to the interviewees, during the **pandemic lockdown** only essential platform workers were allowed freedom of movement, which meant they needed to be formally employed. Those without employment contracts had to be officially registered before they could provide delivery or ride-hailing services. However, those who worked for platform companies that did not require them to sign formal contracts were again given the option to choose whether or not they wanted such contracts. This meant they had to pay fees to intermediaries to register them as workers. According to one respondent:

*"They offered registrations during the curfew. Those who wanted to register signed contracts and got official permits that allowed them to be outside during the police curfew. Agencies charged 8 percent plus taxes. The agencies did not want to bear any expenses, so couriers had to pay for everything themselves."*

However, after the lockdown was lifted, this trend came to an end so workers in general continued to work both with and without contracts. Still, notably, fewer platform workers entered into formal contracts with intermediaries. The focus groups in Novi Sad and Nis confirmed these findings. Moreover, only one-third of platform workers officially registered as sole traders. The main motivation was reported as: 'I want to open my own firm because that way I know what I pay and who I pay my taxes and other contributions to.'

These findings reveal that platform workers were in a perilous legal position as they were not employed by platform companies, but rather by intermediaries, which either did not provide legal employment or do provide work contracts with embedded precarious characteristics.



## 4. Social protection of workers

Social protection is a cornerstone of the **decent work** approach, as its purpose is to provide insurance to workers who are unable to work due to illness and those who retire, as well as to ensure that workers can have paid vacations, disability insurance, maternity and paternity leave, etc. The constant flexibilisation and precarisation of labour, spearheaded by the platform economy, endanger these safety nets (e.g. Vallas & Schor, 2020). In addition, examining social protection in the platform economy requires establishing a direct relationship between the types of workers' contracts and their rights to social protection.

As shown above, Serbian platform workers were either self-employed (sole traders) or engaged through intermediaries (temping agencies), or were not legally registered at all. In all of these cases, social protection arrangements were ultimately externalised to the workers and intermediaries. Thus, social protection of platform workers depended on the type of employment and contract, including the type of intermediary they were affiliated with.

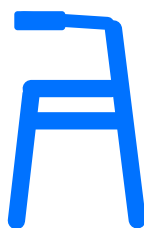
Many workers' employment arrangements did not include **health insurance**. Many were not even interested in the topic. One interviewee observed: 'I don't need it, I'm not sick', whereas another claimed: 'I was considering finding insurance I would pay for on my own, but I didn't give it much thought, it wasn't that important.' Several other respondents did not even know whether they had health insurance. This reveals just how little relevance platform workers ascribed to this aspect of decent work. 'I was told that Glovo provides that and that it isn't connected to the agency, but maybe they lied to me, I don't know, I didn't look into that.' The majority of the respondents nevertheless arranged health insurance through different means. Those who worked part-time were insured through their primary (other) jobs, and others were insured through family members or spouses.



Individuals who were unable to work due to illness could take as much sick leave as they needed, yet those without formal employment had no access to **paid sick leave**. This was a key reason why this group worked even when having health issues, as they could not afford the loss of income. Moreover, some platform companies' regulations actively deterred workers from taking sick leave even if they needed it. For example, CarGo required those who rented a company car to keep meeting rent instalments even if not able to work due to poor health. This strongly discouraged workers from taking even unpaid sick leave. One exception to this practice was Glovo, which claimed to pay workers 15 euros per day during sick leave if they provided proof of being hospitalised. However, the findings suggest this procedure is not observed. One respondent reported being hospitalised and expecting these benefits but never receiving them:

*"Once I fell off my motorbike and broke my collar bone and let them know I wouldn't work until it healed... I hadn't worked for 35 days. The person from the agency I was in contact with offered me 15 euros per day while I was on "sick leave", but I didn't get anything, that's how Glovo works. Luckily, I have another job, otherwise it would have been horrible."*

Furthermore, only those in formal employment had **pension contributions** paid in their name. The pension contributions varied widely depending on the working hours stipulated by the contract. As actual hours worked were drastically underestimated in these contracts, especially casual work agreements, pension contributions were at the low end of the scale. For example, one respondent who worked some 12 hours per day, but was registered for only 4 hours per week, jokingly estimated his pension would be around 2,000 RSD per month, 'just enough for one decent trip to the supermarket.' Finally and significantly, very few respondents found pensions important. One interviewee expressed this sentiment as: 'Pensions probably won't exist when I grow old.'



While workers for delivery companies could get flexible **vacations** whenever they wished, for many this vacation leave was unpaid. Thus, many avoided any kind of leave for financial reasons. As one interviewee reported, 'No-one pays for my vacation but myself, neither the state nor the company. I steal from myself if I have to take a vacation.'

Other aspects of social protection such as maternity and paternity leave followed the same pattern as sick leave and annual leave, as it was ultimately up to the workers to choose whether or not to work, with no remuneration envisaged for any such leave.

Social protection, a key aspect of the decent work concept, is almost absent from blue-collar platform work as it is determined by employment status. Although health insurance and social protection benefits were provided to registered workers on several different grounds, many of those who worked without contracts did not have access to these basic safeguards. This means that paid vacations, sick leave, maternity and paternity leave, pensions, and the like were rare among Serbian platform workers. Workers had the dubious freedom of choosing whether to be absent from work in these situations at their own expense. However, a crucial finding of this research was that most workers did not consider social protections important. Their key goal was short-term financial gain, which seemed to be the only thing they could hold onto in an extremely precarious and uncertain environment. As such, decent work in the platform economy cannot be achieved until legal issues with employment are solved and the workers are covered by a satisfactory social protection system.

## 5. Working hours

A standard 40-hour working week is considered a cornerstone of the Decent Work Agenda as it represents a departure from extremely long working hours deemed to be exploitative and harmful for workers. A fixed schedule of 8 hours per day, 5 days per week, is supposed to give workers enough time for rest and other activities (ILO, 2007).

Major changes introduced by platform work include flexible working time and the opportunity to work part-time on the platforms. Previous research on blue-collar platform workers shows that flexibility is a key incentive for workers to join platforms and an important hallmark of this type of work (Huws et al., 2016; Goods et al., 2019). Recent research, including this country report, confirms such findings.

However, the findings of this study reveal **part-time** work is not a realistic option for platform workers, as long working hours are either mandatory or strongly incentivised by the payment mechanisms that the platforms enforce. The results suggest that working part-time was previously a feasible and widely used option by the majority of CarGo drivers: 'It was a great thing back then, most of us were part-time, working on weekends and combining it with our other jobs.' Delivery platforms initially offered the freedom to choose one's working hours, whether full or part-time. For instance, part-time platform delivery workers mostly endeavoured to fit their working hours into other obligations, working on average from 4 to 6 hours per day, a few days per week.

Yet, the study found that full-time work was the prevailing arrangement (and one strongly incentivised by the platforms). The majority of **full-time** delivery workers worked from 10 to 12 hours per day, with just one or two days off work every month. This meant their working hours were significantly longer than would be expected in standard employment. The respondents' monthly working hours ranged from 150 to 330, and, even though most worked between 200 and 300 hours, this still greatly exceeded the 170 hours per month assuming a standard 40-hour working week. At CarGo, drivers took on exceedingly long hours compared to other platform workers, clocking up as many as 15 hours per day. This was caused by the excessive daily and weekly targets set by the platform company. However, the findings of focus groups in Novi Sad and Nis indicated that platform workers outside Belgrade worked between 6 and 8 hours per day.

While neither delivery nor ride-hailing platforms enforced these extremely **long working hours**, they did **strongly encourage them**. For example, in order to meet weekly bonus targets, CarGo workers had to work at least 60 hours per week or face penalties. Essentially, they would earn next to nothing if they decided to work fewer hours. One of the drivers illustrated this as follows: 'You must work 12-hour days, 6 days per week. You have to make 70,000 RSD in a week, which is impossible in 6 days. Then you have to beg



them to let you drive one more day at your own expense, just to reach the target. Trust me, they're crazy.' A similar model was encouraged by Glovo, which offered various bonuses for longer working hours. In the words of one respondent, 'the reality is that you have to work 10-12 hours, 7 days per week, to qualify for the ever-changing bonuses. They would love it if we could work 14-15 hours per day.' Similarly, interviewees who worked for Wolt and Donesi said these firms also actively promoted longer working hours.

Despite long working hours being against the notion of decent work, they guarantee blue-collar platform workers future employment. This suggests that platform workers can rely on being engaged for a sufficient number of hours in the following working week if they work the (long) hours 'suggested' by the platforms. This guarantee is purely market-driven due to the high demand for delivery services, and is not defined anywhere in the contracts that some workers sign with intermediaries. Thus, although there is no formally guaranteed working week, this arrangement is an important safety net for many workers. According to one courier, 'There is always work, that's the most important thing.' Moreover, the results indicate that platforms allowed workers access to different working hour slots. At Glovo and Donesi, higher-rated workers Donesi got first pick of working hours, leaving workers with lower ratings without much choice. In addition, the guarantee of sufficient work was reported to be an important motivator for doing platform work. In the words of one interviewee: 'I'm here because there's always enough work. The demand for delivery is huge.'

Despite most delivery workers facing pressure to work longer hours and fluctuating demand for work, their working hours were quite **flexible** as they could choose their working days and time of day, which gave them some work-life balance. Although CarGo workers had a mandatory working week of at least 6 days, they could still choose the time of day that best suited them. As a result, most interviewees and focus group participants agreed this was a primary motivating factor for continuing engagement on the platform. Confirming the latter, an interviewee claimed:

*"The main motivation for me is the flexibility of working time, you chose your hours based on how much you want to earn, and I like that flexibility (...) I can combine my working hours, so they are partially flexible and I can adjust them to my family responsibilities. My wife works full-time and then I also need to take children to nursery school and do other things."*

Flexibility was not only a motivation for starting work but also one of the main factors making the job easier for many platform workers. As one courier indicated, 'Flexibility is the biggest advantage of this work. You can practically work as much as you want and when you want, it's entirely up to you.'

Each platform company regulated the **choice of working hours** differently. Donesi offered the least flexibility, as workers there could choose between shifts of 3, 5, or 7 hours once per week. Glovo, on the other hand, gave its employees shifts of two days per week and permitted them to cancel their selected slot 3 hours in advance. Wolt was the most flexible, as workers could turn the app on and off freely. Although CarGo was the least flexible about the number of working hours, its drivers could choose the time of day they wished to work.

The guaranteed working week has recently faced **large fluctuations due to changes in demand for delivery and ride-hailing services** caused by the pandemic. The impact of the lockdown on delivery platforms was manifested by initial boom of demand of delivery services, which increased the stock of work within this field. As one of the respondents noted: 'The volume is ridiculously high. I had 27 deliveries in one day, and some people even did 30 or more. The work just exploded.' On the other hand, CarGo drivers suffered the most dramatic impact, as the demand for ride services fell drastically. This led to a huge drop in working hours, and, consequently, a decline number of workers as well. One worker enumerated the likely reasons: 'There are no foreigners now, many companies which subscribed to CarGo now work online, and the clubs are closed.'



**Breaks** during working time are informal rather than explicitly regulated. Wolt's workers were able to turn the app on and off as they wished, so they could arrange their own breaks during the day. Glovo and Donesi did not formally regulate formal break times either. However, couriers reported not having a constant stream of delivery requests and often having to wait at restaurants, which gave them enough time to take breaks. CarGo allowed its drivers only 5-minute toilet breaks and 15-minute lunch breaks. However, as with other platforms, demand for work was not consistent during the day, so workers did manage to get some rest in the intervals. Still, even though the breaks were not regulated and guaranteed, they did completely depend on customer demand.

As reported in the interviews, the part-time work option was chosen mostly by young people, students, and those who had other off-line jobs or were retired. By contrast, platform work was the only job for full-time workers, who were mostly middle-aged men who owned their own cars or motorcycles.

In sum, platform work provided greater flexibility than standard employment as it allowed the freedom to choose one's working hours. As noted above, the ability to achieve some degree of work-life balance was a key motivator for taking on this work. In addition, rising demand for delivery services guaranteed the working week, even though this element of decent work was not contractually regulated. Nevertheless, this was not the case with jobs for ride-hailing platforms, where factors such as mandatory full-time work and lower demand had in recent months adversely affected flexibility and prospects for work-life balance.

## 6. Pay of platform workers

**Decent pay** is an essential pillar of the Decent Work Agenda. By earning a liveable wage, workers can attain satisfactory living standards. In line with the findings of previous re-

search into “crowdwork” or remote work via online platforms (Andjelkovic et al., 2019), blue-collar platform workers reported earnings above what was considered an average wage for Serbia. As one of the delivery workers illustrated, ‘Regardless of the downsides, you can’t earn this amount of money in a regular job in Serbia’. Income were seen a key advantage that highly motivated workers to join the platforms. A respondent referred to this as follows: ‘I am here mainly because I can earn 120,000 RSD [some EUR 1,000] per month. That’s an amount that suits me here and I don’t have to go back to Germany to work.’



While it is difficult to discuss wages in standard gross and net terms as the workers had to pay many of their costs out of pocket (Goods et al., 2019), the respondents referred to their total monthly earnings as their net wage, suggesting that the concept of gross wage was not recognised as these individuals rarely paid social contributions and other costs inherent to gross wage calculation.

A few delivery workers interviewed reported their **earnings** could be as high as 200,000 RSD (some EUR 1,700) per month in Belgrade. This was an exceptionally high sum compared to the average Serbian net monthly wage, which in June 2020 amounted to approximately 60,000 RSD, or about EUR 510 (Statistical Office of the Republic of Serbia, 2020). The figure is all the more striking considering these were low-skilled jobs. However, for a worker to reach 200,000 RSD per month, they had to clock up an exceedingly high number of workinghours, close to 300, assuming stable and/or increasing demand for delivery and ride-hailing services. As a result, most delivery workers in Belgrade were able to earn on average 100,000 RSD (some EUR 850) per month, although the figure varied depending on the platform company, hours worked, and type of vehicle. The findings reveal that Donesi offered opportunities for the highest earnings, while Glovo had the least attractive remuneration rates. However, focus groups suggest that the average earnings of platform workers outside Belgrade who work between 6 and 8 hours per day range between 50,000 and 100,000 RSD per month while those working up to 14 hours per day may earn up to 140,000 RSD.

Finally, monthly earnings at CarGo could reach 100,000 RSD, although most ride-hailing platform workers earned close to 60,000 RSD due to the recent changes to company rules.

Furthermore, cost externalisation is key to understanding the difference between net and gross earnings of platform workers. These costs included, as indicated previously, service fees paid to intermediary agencies or sole traders, social protection contributions, as well as fees for app use or car rental, as at CarGo. Thus, CarGo externalised its costs to a much greater degree. Workers additionally paid 30 percent of their earnings as a fee for using the app, while those who rented vehicles from CarGo had to give up between 50 and 70 percent of their monthly earnings in rent to the company. However, these costs were not



included in self-reported net earnings.

By contrast, other costs often were included in self-reported net earnings. For example, food and fuel expenses were the usual hidden daily costs. The monthly cost of car servicing and cleaning was an additional burden for platform workers. This was illustrated by one respondent:

*"Earnings are an illusion because in the long run you wreck your car, otherwise they'd have their own cars. This way, we have to pay for fuel, service, accidents... You have to constantly turn your engine on and off, that wears it out much faster than usual. Not to mention parking on the sidewalk, I literally have to park up a tree."*

Importantly, it appears that those not in formal employment earned higher wages, but only at the cost of avoiding social and other contributions. As one delivery worker observed, 'If I were legally employed, I'd have to pay taxes out of pocket, like everything else. When you take everything into account, it's doubtful whether this work is as lucrative as we may think.'



**The structure of earnings** differed across delivery companies. Glovo paid workers a fixed amount per start of a delivery run and then a variable amount depending on the number of kilometres and minutes of waiting time for each run. Earnings also depended on the type of the vehicle used by the delivery worker, with those who used cars and motorcycles receiving fuel bonuses. Several bonuses were made up of fixed remuneration depending on the number of deliveries. Workers reported earning roughly some 500 RSD (about EUR 4.3) per hour on this platform. Wolt used the same calculation system as Glovo, although remuneration was significantly higher for each of these components, while workers received a fixed hourly rate of 250 RSD (approximately EUR 2.1) if they had no deliveries in that hour. Donesi also offered a fixed hourly rate of 300 RSD (some EUR 2.5), however, its workers were paid only a fixed amount for each delivery, irrespective of distance.

**Tips** were also a significant portion of delivery workers' earnings, sometimes running as high as 20 percent of their daily wage. CarGo calculated earnings based on distance, waitingtime, and a fixed starting fee. However, the amounts for all these components depended on the class of vehicle provided by the worker, with the 'mini' class attracting the lowest, and the 'business' class the highest earnings. These different calculations and the piecemeal nature of the wage were thus the sources of variations in earnings for this type of platform work. The fluctuation of demand due to the pandemic lockdown is also an important consideration when interpreting these differences in earnings. During the lockdown, some couriers reported earning as much as EUR 100 per day due to extreme demand, while, on the other hand, some CarGo drivers made minimal amounts.



Furthermore, workers across all Serbian platforms have been facing increasingly common **wage cuts**. Their earnings had been reduced several times, with a number of drivers reporting they had to drive twice as much to earn the same amounts when compared to a year ago. Earnings at CarGo fell the most, as the company constantly increased fees for app usage and ultimately forced workers to rent its cars. Many workers complained about this constant decline in their wages and predicted the downward trend would continue as the platforms cornered more of the market: 'When they come onto the market, these companies provide excellent conditions so you can serve as a mobile advertisement for them. Once they dominate the market, they just cut your wage because they can.'

An often-cited positive facet of delivery platform work was that wages were **paid regularly**. This was confirmed by the majority of the workers interviewed in all three cities: 'No, pay is never late. That's one of the best parts of this work, it's fair.' Yet, while delivery platforms did make regular payments, CarGo was less punctual. **Late payments** were reported to be a pressing issue at CarGo, as one driver explained:

*"The wages are constantly late. The agreement is to get paid for the first 15 days of the month at the latest by the 20th. Now it's on the 25th, 26th, or 27th. And then that causes the next payment to be late, and so on. There's always a delay of at least 10 days'. This is a significant problem for drivers as they do not have the liquidity to deal with daily work-related expenses such as fuel, repairs, or car washing."*

Another pervasive problem was that workers were sometimes **paid less** than they were supposed to be according to the companies' own rules. For example, Glovo workers described cases where they received lower wages than calculated by the firm's algorithm, as explained by one respondent: 'Every day at 9 am my co-worker calls technical support to check all the mismatches between his distance calculations and the money he received. At least 900 RSD goes missing every day.' Thus, information asymmetry in terms of how the platform algorithm works can lead to workers being exploited.

The notion of **minimum wage** must be taken into account when considering the concept of decent pay through decent work. However, this issue is highly complex in the platform economy, as can be inferred from the pay calculation rules described above. Firstly, hourly wages are not guaranteed as workers on these platforms earn piecemeal pay and their earnings depend on the number and characteristics of deliveries and rides. Secondly, these workers are paid gross wages and their work-related expenses need to be taken into account when discussing the minimum wage. That being said, the average net hourly remuneration reported by the interviewees was significantly higher than the Serbian statutory minimum wage (of approximately 170 RSD/hour net). As such, while platform workers did earn more than what was considered the national minimum wage, they still faced a piecemeal payment system.

Moreover, the respondents offered a variety of value judgments about the platforms' payment systems. While some considered them to be fair, others stressed their exploitative features. The payment system was described as proportional, meaning that pay rose in proportion to the quantity of work done, while pay calculation was seen as transparent and predictable. As stated, this was rarely the case in off-line work, where pay

calculation methods were blurry, with privileged workers profiting more than others. A respondent reported: 'My work, my effort, my sweat all pay off in the end. I don't give anything to anyone else, my money stays in my pocket.' By contrast, ride-hailing platform work was referred to as increasingly exploitative. The interviewees indicated that their earnings did not rise correspondingly with any increase in profits of the platform company, but, on the contrary, their pay kept falling: 'They do not have any expenses, they just take the surplus from my work. My vehicle, my fuel, my everything. They gave me an app in exchange for 30 percent, so if I make 10,000 RSD today, they just take 3,000 without having to do any work'.

To conclude, decent pay as a component of the decent work paradigm was seen a key motivation for doing platform work. This type of work provided one of the best earning opportunities for unskilled and low-skilled workers. However, high externalisation of costs, including work-related expenses and social contributions, must be taken into account when discussing the notion of decent pay for platform work. In addition, the cuts in payments by some platform companies have added to the already high costs that must be met from gross pay. Despite these recurring costs, decent pay is indeed an important feature of blue-collar platform work in Serbia.



## 7. Security

Security, understood in the context of this study as occupational health and safety, is considered an integral facet of the decent work concept. As discussed previously, platform companies are not formal employers, and, in contrast to standard employment, they do not see themselves as being responsible for ensuring health and safety in the workplace. However, occupational safety is a prominent dimension of blue-collar platform work. Being self-employed, in many countries these workers lack access to occupational safety (Lane, 2020). Research has identified high risk of hazards such as traffic accidents, as well as occupational illness caused by long working hours and exposure to harsh weather conditions (Goods et al., 2019). It has also been shown that these workers are vulnerable to crime such as robbery and sexual harassment (Huws et al., 2016). This study has found several safety-related issues inherent to blue-collar platform work in Serbia, with common ones including traffic accidents, health hazards, conflicts in the workplace, and legal penalties.

**Traffic accidents** pose an extremely prevalent risk to ride-hailing and delivery workers in the three Serbian cities. In the words of one respondent who reported having had an accident: 'Anyone can fall and never get up again... So many stories about accidents (...) A single mistake can get you either to the hospital or an early grave.' The majority of the couriers and drivers interviewed claimed to have experienced traffic accidents resulting in

injuries of varying severity. According to a CarGo driver, there was one accident approximately every two days, with around 50 new cars damaged in recent months. Interviewees indicated the the primary ones were long working hours and driving at excessive speeds in a rush to meet targets and receive bonuses.



Platform workers were also responsible for maintaining **accident insurance** themselves, as platform companies did not insure them. As such, most managed their own insurance policies and covered the costs of insurance. One delivery worker explained the issue as follows: 'You can only pay private insurance for yourself. You don't work for the platform and they won't stand behind you. No document says you work for them.' If a worker is involved in an accident and found guilty, he or she is responsible for any resulting fines and costs. Moreover, if deemed responsible for damaging the company's vehicle, such as at CarGo, they are forced to work for free to pay off the damage. One interviewee likened this policy to 'debt bondage', adding that drivers were 'left on our own and have no one to complain to as there's no rule of law in this country.'

In addition, focus group participants in Novi Sad and Nis confirmed interview accounts about the lack of formal occupational health and safety arrangements, noting that, paradoxically, it was platform workers themselves who were responsible for ensuring a safe working environment.

**Health threats**, such as infection, exhaustion, and stress are common safety issues caused by this type of work. The nature of the work, which involves frequent interactions with service users, made it highly hazardous during the Covid-19 pandemic. While some workers sought to protect themselves from the risks of close contact during the outbreak, others did not consider this a pressing issue as they had been given personal protective equipment by the platforms. Some interviewees reported being very cautious and afraid about how the work might affect their families:

*"It's a huge risk to deliver something to an infected person. You need courage to step into the red zone because you're taking risks personally and putting your family in danger. It's really hard to constantly work wearing a mask and gloves and using disinfectant before every delivery (...) During the pandemic, we delivered a lot from pharmacies. It's a huge risk during the pandemic when a someone orders a thermometer, painkillers, and antibiotics... I was really afraid because I have two older people living with me."*

Nevertheless, many were not afraid to work during Covid-19 peaks. Donesi and Glovo provided masks, gloves, and disinfectant, while Wolt's workers had to source personal protective equipment themselves, but the cost was later reimbursed by the platform. However, as indicated by focus groups participants in Novi Sad, Wolt provided only one set of protective gear for the whole period of the pandemic, which meant the workers them-

selves had to pay for additional masks and gloves out of pocket. Although they wore face masks, CarGo workers were equally exposed to the risk of infection as they could not deny service to customers who did not use masks.

Finally, as reported by the interviewees, **conflicts** – including **legal penalties** – **were a recurring hazard**. CarGo drivers often reported confrontations with taxi drivers and, to a lesser extent, customers. Some reported taxi drivers ramming their cars, chasing and threatening them, or revealing their personal information. CarGo drivers also reported many instances of their cars being impounded by the authorities without clear reason. By contrast, delivery workers stressed they were solely responsible for parking fines as no regulations allowed them to park vehicles legally when delivering goods. One courier claimed ‘This can spell the end for the entire profession.’ Companies have not addressed this problem, claiming that the couriers were not their employees. As a result, delivery workers launched an online petition and eventually registered an association to advocate an exemption from parking regulations in Belgrade that would allow them to do their jobs without facing fines and legal threats.

Safety is, thus, an often overlooked aspect of decent work for blue-collar platform workers. The risk of accidents, conflicts, and legal penalties, and issues with insurance coverage contributed to the highly unsafe environment for these workers, as do a lack of protective equipment and safety training and the generally limited protection and assistance offered by the companies.

## 8. Social Dialogue

Social dialogue is an important historical legacy of the labour movement that has allowed workers to safeguard their rights and welfare by participating in decision-making both within companies and at the national level. However, arrangements for such participation and social dialogue are underdeveloped in the platform economy, due to platform companies’ business models and employment policies. Previous research has confirmed there was no room for workers to negotiate, while their working arrangements were governed purely by platform algorithms and there was no contact with company management (Huws et al., 2016). In most countries, these workers’ self-employed status prevents them from engaging in collective bargaining, although there are exceptions in some European nations where blue collar platform workers’ unions have been formed (Lane, 2020). This type of governance raises the fundamental question of how social dialogue can be achieved.

Firstly, as argued previously, platform companies’ decision-makers are separate from intermediary agencies, which are responsible for employing and paying workers who are not registered as employees. There is thus little to no communication between platforms and workers. As one driver put it: ‘They’re above us, we can’t reach them and we don’t have any rights. The labour market is such that if you don’t want to work, someone else will (...) I don’t have an idea who in the company to complain to.’ As described previously, the intermediaries are also dependent on platform companies and do not participate in

decision-making, so workers are unable to negotiate with them either in the hope of bettering their working conditions.

**The government**, which was supposed to be the main regulator of industrial relations, was not seen as an actor that workers could turn to for social dialogue. This was partly due to the unclear status of workers and employers and precarious contracts, as described above. Some viewed the government as a distant entity entirely unconcerned with the platform economy or incapable of regulating it.



Mistrustful of either the platform companies or government institutions, workers **self-organised** in an attempt to solve their problems. One driver observed: ‘We are alone in the street like dogs, without anyone's protection. We have no-one to rely on except ourselves.’ The findings reveal an exceptional sense of community between workers across platforms based on their shared position and hurdles. There have recently been several notable instances of worker organisation: workers at Glovo attempted to unionise, although they ultimately set up a web site for sharing ideas, criticising working conditions, and proposing solutions. A trade union had been considered but was not established as no model for it could be found.



However, the interviewees revealed that workers had organised two major strikes over conditions at Glovo and CarGo. Dissatisfaction at Glovo, chiefly over pay cuts, led to a strike in January 2020 where the workers would log onto the app but not perform deliveries for a certain period of time. The goal was to shut down the app as there would not be sufficient couriers to meet customer requests. In response, the company's management decided to consider the workers' grievances but in the end only partially met their demands. CarGo drivers also engaged in a similar action seeking payment of late wages. The strike was only partially successful as the workers received only a fraction of the unpaid income.

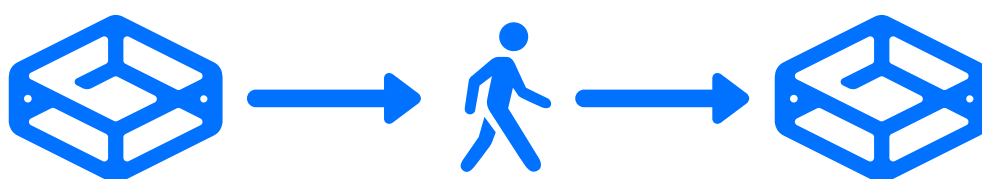
The interviewees pointed out several reasons why these various attempts enjoyed only limited success. Firstly, high turnover and low hiring thresholds militated against the creation of stable workers' structures. Preoccupied with earning a bare existential minimum, many workers refused to be involved in any sort of social dialogue. A respondent corroborated this view: ‘There are a lot of people who can barely make ends meet and this is all they have in life. As long as there are cases like this, we will continue destroying ourselves.’ In some cases, worker organisation was also hampered by individuals siding

with the management to prevent industrial action while reaping personal benefits. Finally, platform companies' managements actively prevented any kind of effort by workers aimed at improving their conditions. This was especially pronounced at CarGo, where the management monitored Viber groups to identify ringleaders and ultimately laid off or penalised some of them. One driver recalled: 'Some (Viber) groups were shut down as soon as there was discontent with working conditions. Some rebels were fired straight away, they'd just shut them out of the platform.' Donesi managers also joined delivery workers' Viber groups to halt any potential action.

Conversely, the focus groups reported no efforts to self-organise in Novi Sad and Nis. Platform workers from these cities described there being little incentive for self-organisation, which was discouraged due to the inherently temporary or transitory nature of the work. Nevertheless, in Nis the workers created a Viber group to manage working hours slots.

These obstacles discouraged most workers from any type of collective action. As a result, online groups were created that served crucial purposes, such mutual assistance with day-to-day issues, including what to do in accidents, sharing traffic information and experiences, and the like. As noted above, this was the only source of assistance and support the workers could firmly rely on. Moreover, acts of assistance are highly encouraged among online group members, with a ranking system in place to promote the culture of support. For example, one online group (recently registered as citizens association), called Beogradskih 300 ['Belgrade 300'], provides financial assistance to members in need. The group's founder described how their help benefited an injured member: 'He's not entitled to any benefits because he hasn't got a contract. He'll literally survive for these 15 days on our membership dues.' In addition to playing this instrumental role, online groups also served as venues for socialising.

Ultimately, social dialogue is completely squeezed out by the **volatility of the market and management obstruction**. Although conditions in the Serbian labour market impeded organisation, many platform workers saw the market as their only remaining leverage in the struggle for better conditions. Moreover, workers often moved to other platforms when working conditions decline. For instance, pay cuts made many CarGo drivers move to Glovo, which was in turn abandoned by many workers in favour of Donesi and Wolt. However, many respondents were sceptical about the benefits of moving, as they reported conditions had been deteriorating across all platforms. Instead of relying on social dialogue, the workers could only hope their position would improve if a new company entered the market. As one worker put it, 'A new company is expected to arrive in September, and we will all move there because in the beginning all offer great working conditions.'





Social dialogue is a sorely needed component of the decent work concept in Serbian platform work. The absence of formal employment, as well as complex organisational structures, make it difficult for workers to pinpoint a point of contact for voicing their grievances about working conditions. Self-organisation may have been successful, but has made little impact on employers. While blue-collar platform work might offer greater flexibility and better earnings compared to traditional work, platform workers ultimately remain disempowered due to a lack of legal means to negotiate working conditions and safeguard their interests.

## 9. Competency development and careers

The Decent Work Agenda is concerned not only with the strictly material aspects of work, such as pay, safety, and stability, but also emphasises the importance of personal development through work. Research conducted among Serbian white-collar workers (Andjelkovic et al., 2019) shows that digital workers were both personally responsible and free to develop their skills in a variety of professional domains. However, working for ride-hailing and delivery platforms differed dramatically as it was regarded as unskilled or low-skilled work (Goods et al., 2019), which has important implications for competency and career development.

Delivery and ride-hailing platforms offered no **competency development**, with the exception of induction training that consists of giving workers essential information, including tutorials on using applications, which interviewees considered sufficient for the job.

Skills development was thus not the focus of blue-collar platform work, as it entailed performing automated and simple tasks. Most respondents confirmed this view:

*"Platform work is extremely simple. When you come to the interview, no one assesses any of your skills. The job such that even a chimpanzee can do it. Even with a foreigner, you don't need to know a foreign language. You just need to know how to drive and say "Hello"."*

Nevertheless, a few workers reported they the work allowed them to informally gain valuable driving and traffic safety skills, learn how to navigate the city better, and master basic service competencies.

Platform workers also faced limited prospects of **social mobility** within or between companies, understood as opportunities for vertical mobility to hierarchically higher positions. The platform companies' business model did not support vertical mobility, but rather enforced horizontal (in)equality.

In the similar vein, **mobility to non-platform companies** was hindered by the fact that skills and competencies developed on platforms were difficult to transfer to other sectors of the labour market. The only exceptions were jobs in the same sector, such as driving and delivery.



Finally, as platform work features close interactions with clients, personal connections could be expected to promote professional mobility. However, this did not seem to be the case at all for delivery platforms, while CarGo drivers, especially those who drove business class vehicles, reported a few cases where connections with customers facilitated professional mobility.

**Career-wise**, one-half of the respondents considered platform work as temporary jobs, while the other half intended to remain with these firms in the longer term. Those who saw platforms as only a transitory phase were motivated by the opportunity to quickly earn a substantial income so they could start their own businesses or look for regular jobs in their chosen careers or for which they had trained. Interviewees who aspired to find regular jobs were mostly university graduates or were developing IT skills that could enable them to find decent work. As noted, platform work supported neither career development nor social mobility, a major risk of remaining in this occupation:

*"This job offers no perspectives for personal development, although you can earn up to 250,000 RSD per month.... There is enough work, it pays well, but I don't see myself as doing deliveries all my life. I want to advance intellectually. This job is not vertically mobile."*

In contrast, those with lower educational qualifications considered platform work as a good place to be and remain. In addition, focus groups participants from Novi Sad and Nis unanimously confirmed that platform work was not a long-term option and did not entail career development.

Although platform workers' career prospects were limited by the nature of the work and the business models employed by the companies, some aspects of the jobs provided **personal fulfilment**, which was one motive for engaging in platform work. Respondents saw themselves as 'their own bosses' able to work as much or as little as they needed to. 'You don't have a boss, you just go out onto the street and work. You're free and you can choose an arrangement that suits you.' Moreover, some CarGo drivers, mainly young working-class people, engaged in platform work purely with the aim of achieving the outward appearance of higher social status conferred by the expensive cars that could be rented from the platform.

In sum, competency and career development, as dimensions of decent work, appear to be largely underdeveloped in blue-collar platform work, in contrast to the narrative of many possibilities for career development and personal development inherent to white-collar platform work. The characteristics of blue-collar platform work thus discourage skills development, upward mobility, or transfer of knowledge and skills between jobs. In consequence, this work is not considered a desirable career path, although many respondents reported intending to keep their job for financial reasons and lack of other opportunities.

# **PART THREE – CONCLUSION**

## **Introduction**

This research aimed at examining prospects for decent work on Serbia's pioneer online delivery and ride-hailing mobile app platforms, Glovo, Donesi, Wolt, and CarGo. Most of these platforms have been active in the country since 2018-2019, apart from Donesi (today a member of the Delivery Hero chain), which was established as early as 2006 but only introduced a mobile app in 2014. Despite their relative novelty in the market, these services gained momentum with the surge of Covid-19. As such, their customer base rapidly expanded throughout 2020, while the status of delivery workers and ride-hailing drivers became even more precarious. In this regard, the findings generally suggest an absence of working standards in line with the Decent Work Agenda. Nevertheless, the mobile app platforms have attracted considerable numbers of workers interested in trading full-time employment and social and health insurance for better remuneration and more flexible working hours.

The insights of this research reveal both many similarities and major differences between platform workers in Serbia and their peers in other advanced economies in Europe and elsewhere, primarily caused by loopholes in Serbian legal framework.

## **1. Differences between Serbia and other countries**

### **Pay of Blue Collar Platform Workers**

Due to the scarcity of jobs and poor working conditions offered by the local labour market, ride-hailing, and especially delivery platforms, provided relatively attractive job opportunities in Serbia. Earnings on these platforms were found to be much higher than what the workers with this level of skills could generally earn in Serbia. This was particularly true for workers without formal qualifications, who were however a minority among online delivery workers. Moreover, Serbian platforms offered these workers a consistent supply of work, which meant they could generate considerable incomes and so achieve a degree of financial stability.

This is in contrast with findings in the developed world, where blue-collar platform workers face financial precariousness, including significant underpayment (Kalleberg & Vallas, 2018; Scholz, 2016; Ravenelle, 2019). This difference can be explained by the fact that Serbia is a new territory for online food-delivery and ride-hailing platforms, which are still positioning themselves in the local market. As shown by evidence from other countries, once the platforms position themselves, the race to the bottom in remuneration begins. In developed countries, most workers viewed the work as poorly paid but stable (Goods et al., 2019; Milkman, R., Elliott-Negri, L., Griesbach, K., & Reich, A., 2020; Ravenelle, 2019; Rosenblat, 2018; Scholz, 2016; De Groen et al., 2018). Regardless of differences in pay, this kind of work is not considered a long-term opportunity either in Serbia or in developed countries.

## Demographics of Platform Workers

The demographics of platform workers in Serbia and elsewhere are driven by the characteristics of the local labour market and remuneration. In Serbia, the workforce was largely composed of middle-aged men with relatively long working histories who have secondary school diplomas or a higher educational attainment. Furthermore, women rarely populated these professions, apart from a few exceptions such as in Nis. Students usually look for part-time work, while the remainder worked full time.

By contrast, in EU27 this type of work was often done by migrant workers. Foreign-born workers were significantly more likely to provide services via digital labour platforms than native workers in a variety of locations in Europe (Urzi Brancati, Pesole & Fernández-Macías, 2020), Australia, and the US (Goods et al., 2019). The large proportion of foreign-born platform workers may suggest that digital platform work was not particularly attractive, as several studies have demonstrated that foreign-born workers tend to be employed in lower-quality jobs and be overqualified. Overrepresentation of migrants providing services via digital labour platforms could therefore serve as an indicator of segmentation in the labour market (Grubanov-Boskovic & Natale, 2017; Urzi Brancati et al., 2020).

While in Europe this kind of work is predominantly in the hands of men (Urzi Brancati et al., 2020), different patterns are reported in the USA, where women dominate the delivery side of the market (Milkman et al., 2020).

## 2. Similarities between Serbia and other countries

### Work-life Balance and Job Flexibility

Serbian platform workers were characterised by flexibility and independence, which enabled them to maintain a work-life balance and utilise these job strategically. Although they reported long working hours, they valued the opportunity to organise their free time in accordance with their needs. However, the alleged freedom of choosing working hours was circumvented by platforms, who offered a wide range of tailored incentives nudging workers to work well above 8 hours a day. Although working hours were flexible in principle, they were also determined by this wide range of customised requirements.

These findings match those from EU countries. The need for flexibility and the desire to earn additional income were the main motivational drivers for workers to join online delivery and ride-hailing services (Urzi Brancati et al., 2020; De Groen et al., 2018). Similarly to Serbia, Hall and Krueger (2018) report that Uber drivers chose this profession over full-time employment because of its flexibility. Many of these workers abandoned standard employment and regular professions for this work.

## Contracts and labour Rights

The most important finding of this paper is the prevalence of poor working conditions and non-compliance with principles of decent work stemming from the platforms' outsourced business models and the lack of appropriate regulation of this type of work in Serbia. The combination of these factors enabled arrangements where the workers were not employed by platform companies, although they did de facto work for them: the platforms extracted value from the workers' labour, monitored them, imposed company branding, and ultimately determined payment mechanisms and rules in the workplace. Furthermore, platforms enforced discipline by penalising workers for breaching rules of conduct (for example by not wearing face masks or being late with delivery). Breaking rules could result in dismissal without justification or recourse to appeal. All these traits were in essence characteristic of employers.

Despite determining all rules and working conditions, the platforms did not employ the workers directly, but rather did so through intermediaries which mainly offered workers precarious employment contracts. In addition, some workers had no employment contracts at all. As a result, the Serbian platform economy was distinguished by non-compliance with decent work principles, as reflected in limited social protection, occupational safety, stability, and options for social dialogue.

Although platform workers in Europe appear to be in the same precarious position, their contracts and labour rights have increasingly come under scrutiny from policymakers and advocacy groups in recent years. These initiatives aim at ensuring regulation of their contractual status so as to do away with the variety of different statuses and benefits for virtually the same type of work they perform (De Groen et al., 2018).

According to the most recent COLLEEM Report (Urzi Brancati, et al., 2020), 'platform workers' employment status is one of the most pressing issues from a policy standpoint', as these workers are at the highest risk of being misclassified or finding themselves in bogus self-employment despite the fact that the relationship on the platform takes the shape of an employment relationship in practice (even if the platform's terms and conditions specify otherwise) (De Groen et al., 2018).



### 3. National tools and responses to challenges of platform work in Europe

Of late, European national legislators have been actively seeking solutions for the platform economy. However, the focus of this regulation varies: while some countries have tended to develop policies for certain sectors only (transport services, for example) and competition laws, others focused on labour regulation and built policy responses around it. Lastly, there rarely exists national legislation specific to platform work. Most of the countries have preferred to adapt the platform work to existing legislative frameworks rather than creating new dedicated legislation (Kilhoffer, De Groen, Lenaerts, Smits, Hauben, Waeyaert, Giacumacatos, Lhernould & Robin-Olivier, 2019).

#### Sectoral Regulation and Competition Laws

National legislators' policy responses have primarily focused on personal transport services, and, to a lesser extent, delivery services (Kilhoffer et al., 2019). This is due to several reasons: firstly, the platforms offering these services were the first to enter national markets a decade ago. Secondly, the platforms usually clashed with the traditional providers of these services. Therefore, often under pressure, for example from taxi drivers, legislators rushed to regulate the sectors in three different ways, namely by: a) curbing competition or making new entrants illegal; b) trying to level the playing field by requiring providers, for example Uber drivers, to obtain licences; or c) de-regulating the sector to promote competition. Consequently, a number of EU countries, such as Sweden, Belgium, Slovakia, and Denmark, have essentially banned or driven out platforms in some sectors. Other economies (such as Slovenia) required Uber workers to obtain taxi licenses as a condition for being allowed to work (Eurofound, 2018). Lastly, in yet other countries, such as Estonia, platform businesses have been growing steadily in de-regulated manner, often to the detriment of their more traditional competitors (Kilhoffer et al., 2019).

#### Tax Regulations

Research done to date indicates most regulatory solutions have been reactive (Lenaerts, Beblavý & Kilhoffer, 2017). However, a trend towards more proactive approaches has recently emerged. For example, several countries have turned their attention to tax declaration and collection so as to achieve the central government's fiscal goals (Kilhoffer et al., 2019). Belgium, France, Italy, Slovakia, and others have passed, amended, or considered legislation on the taxation of revenues generated by platforms or income earned by platform workers.

#### Labour Regulations

All these policy changes have affected the status of platform workers but stopped

short of regulating their labour rights, which have been addressed through court cases (mostly focusing on the definitions of employer and employee), amendment of existing broader legislation on nonstandard forms of work, or, least commonly, adoption of dedicated legislation applicable to platform workers.

**Court cases:** The first documented lawsuit against a digital labour platform was brought in 2013 in the US. In the *Otey vs Crowdfunder* case, taking into consideration the Fair Labour Standards Act (FLSA), the court ruled in favour of a minimum wage for Crowdfunder ‘micro-taskers’ who were engaged via Amazon Mechanical Turk. Other documented lawsuits have taken place in the UK, France, Italy, the Netherlands, Spain, etc., all involving transportation or on-location digital labour platforms such as Uber, Deliveroo, Foodora, and Citysprint (Urzi Brancati, Pesole & Fernández-Macías, 2019). More information on lawsuits against digital labour platforms in European countries is available in Eurofound’s platform economy repository.

The most recent court case was heard in Great Britain by the end of November 2020. The ruling of the high court of England and Wales can be potentially game changer for platform workers as it focuses on the responsibilities of the platform controlling how the work is performed once the worker logs on. The implication of this approach is that extends the general obligation of the employer to platforms which accordingly shall ensure the health and safety of workers (Cefaliello & Countouris, 2020).

Another important case took place in September 2020 in Spain, where the court found Glovo couriers were employees and not self-employed (Gómez, 2020). The decision marked the end of a long legal battle where lower courts’ judgments declaring food delivery riders to be Glovo and Deliveroo employees were repeatedly overruled by higher courts (Gómez, 2020). This most recent Spanish court ruling was preceded by the 2019 finding of an Amsterdam court that ruled against Deliveroo by declaring its couriers were employed by the company and not self-employed. While some court rulings have been published, none is final yet and may still be appealed (Urzi Brancati et.al., 2019).

**Amendment of existing broader legislation** Several countries have recently amended their national labour or social welfare legislation to extend its scope to emerging non-standard forms of employment, including platform work. For example, Estonia broadened the Health Insurance Fund Act to include persons working under short term contracts. In several other countries, this extension now enrolls employee-like persons into personal coverage schemes. This was the case in Austria (legislation on equal treatment of temporary agency workers), Germany (legislation for ‘homeworkers’), and Denmark and Lithuania (legislation on income from self-employment) (Kilhoffer et al., 2019).

Other countries have instead opted for establishing a third category of workers, in addition to ‘employee’ and ‘self-employed’, to clarify the employment status of platform workers and/or address the consequences of their mis-classification, including access to social welfare and healthcare. Bulgaria, Spain, and Germany have all introduced intermediary categories of workers who enjoy a different level of social protection, usually higher than the self-employed, but lower than full-time employees. These in-between categories of

<sup>3</sup> RT I, 30.06.2015, 1 amending the Estonian Health Insurance Fund Act.



workers are known as ‘contractors’ (Bulgaria), ‘economically dependent autonomous workers’ (Spain), and ‘employee-like’ or ‘mini-jobbers’ (Germany) (Cherry & Aloisi, 2018).

**Dedicated legislation on working conditions and social protection for platform workers** Legislation on working conditions and social protection that exclusively addresses platform workers is rare, but French and Italian legislators have introduced the most advanced rules to date to safeguard the interests of all gig workers. In 2016, the French Parliament adopted the El Khomri Law, which defines self-employed platform workers as ‘independent workers in an economically and technically dependent relationship with an online platform’. The law highlights the ‘social responsibility’ of such platforms to provide platform workers with access to insurance for accidents in the workplace and professional diseases, training, and continuing development. It also permits self-employed platform workers to start or join trade unions and take collective action. In addition, the law regulates the taxation of income earned by self-employed platform workers (Daugareilh, Degryse & Pochet, 2019).

This law directly addresses the hybrid employment status of platform workers across all business sectors, explicitly clarifying what labour and social rights self-employed platform workers are entitled to. The legislator has found a unique mechanism that confers some labour and social rights to particularly vulnerable self-employed platform workers who are not employees, and, consequently, lack working conditions and social protection safeguards offered by much labour legislation (Daugareilh et al., 2019).

Similarly, the Italian region of Lazio adopted regional legislation in early 2019 with the aim of regulating remuneration, health and safety, and social protection for all types of platform work regardless of the workers’ employment status (IRES, 2019). The law covers many working conditions and social protection challenges that platform workers face and as such is the most comprehensive legislation on platform work so far (Kilhoffer et al., 2019).

In the US, the 2019 California Assembly Bill 5 (AB 5) also addresses the issue of platform workers, requiring them to be re-classified from independent contractors to employees. This piece of legislation has prompted lawsuits throughout California and furious social media campaigns, as well as a multimillion-dollar ballot initiative, sponsored by Uber, Lyft, Postmates, and DoorDash, which in November 2020 resulted in winning the fight to keep the the tens of thousands of drivers the status of independent contractors instead of employees.



## 4. Covid-19 challenges

The examples cited above showcase the pace of changes with platform work, further exacerbated by Covid-19. The pandemic has created a trying situation to which many actors have responded in a variety of ways. Some platforms have decided to tackle health and safety issues by giving delivery workers face masks and gloves, while others, such as Deliveroo, have introduced a daily USD 15 supplement for workers affected by the pandemic.

However, there is little evidence of any attempt by platforms to compensate workers for the loss of income caused by the pandemic. As reported by the Fairwork Foundation (2020), a sample of 191 platforms revealed only 11 compensation policies for lost pay among the leading five global platforms (Uber, UberEats, Amazon, Glovo, and Grab) and another 10 smaller-scale financial and in-kind assistance policies offered by a number of local platforms. Other platforms provided no such assistance.

By contrast, some governments have introduced mediation for platform workers, realising their precarious position stemmed from their unclear legal status. For example, the UK brought in limited assistance to platform workers in August 2020, while other EU countries also offered unemployment benefits even if these individuals worked informally (Denmark) or had no contractual grounds to claim them (Germany, Austria, Spain, etc). Canada and Ireland have continued providing unemployment benefits, paternity and maternity leave, etc. (Lane, 2020).

In the US, the Seattle City Council also introduced an emergency ordinance in April 2020 that requires app-based companies such as Uber, Lyft, DoorDash, and Instacart to pay their workers a form of sick pay, based on days worked for the company and amount earned.



## 5. Serbia's Response

As shown above, Serbian policymakers have shown limited readiness to protect platform workers. Platform work has not been addressed as a separate category by statutory law, which has left these workers in a grey area. The showcased policy challenges across Europe highlighted in the previous section reveal that platform workers may perform virtually the same type of work but may enjoy different statuses and corresponding benefits (De Groen et al., 2018). This also applies to Serbia, where the status of these workers spans from employment through temping agencies, acting as self-employed sole traders, and working in the informal economy. Moreover, Serbian legislators have not (yet) made attempts to regulate platforms as employers.

While many countries in Europe and elsewhere are seeking solutions across different domains (sectoral and competition laws, labour regulations, and platform-specific rules) Serbia remains silent on all these fronts. Existing legislation on casual work, sole traders, and other issues has been applied to platform workers, despite their differences. For its part, labour legislation lacks provisions that would enable these workers to enjoy third-category or self-employed status, as is the case in some other countries.



Attempts have been made to amend sectoral legislation on personal transportation (Act on Transport of Passengers in Road Traffic, 2020) to regulate CarGo operations. Even though it was required to register as a traditional taxi company, the ride-hailing platform exploited loopholes in Serbian legislation to pass itself off as a civic association. Similarly, online delivery services remain outside the scope of Serbian competition due to their registration status (Glovo is registered as an IT consulting firm, whereas Wolt and Donesi are registered as marketing agencies).

Thus, although the impact of the Covid-19 pandemic has made blue-collar platform workers highly visible, nothing has really changed in their status. During the lockdown, the national regulator briefly recognised them as essential workers, but the momentum to address their precarious status evaporated as the restrictions were lifted. These individuals were required to be formally registered as employees during the lockdown. However, the change was short-lived and, at the time of writing, only months later (November 2020), their position remains the same as it was before Covid-19, in a grey area on the verge of informality.

The pandemic has caused many countries to begin advancing legislation aimed at enhancing the status of blue-collar platform workers by turning them into employees or finding hybrid models to allow them to enjoy social and health benefits. Serbia is still far from making such moves. Without protection, either during or outside working hours, options for career advancement, space for social dialogue, and in precarious employment, these workers can only access a few short-term benefits. It is therefore clear that this work is a major break with the legacy of the Decent Work Agenda and workers' historical struggle for decent working conditions.

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