Driver Survey - Working conditions and collective action in the platform-based ride-hailing sector and beyond

Final Report - English Version

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Abstract:

The "Driver Survey - Working Conditions and Collective Action in the Platform-Based Ride-Hailing Sector and Beyond" project gathered new data on the income and working conditions of employed and self-employed taxi drivers in Austria. The survey, conducted online from September 2023 to January 2024, received 241 responses. It explored drivers' collaboration with intermediaries (online platforms, radio operators), collective action, especially unionization, and work-related challenges.

The findings indicate that most drivers, both employed and self-employed, enjoy their work, valuing the autonomy and flexibility it provides. However, only 37% of respondents are satisfied with their working conditions and only about a quarter of respondents are satisfied with their income.

Three-quarters of respondents work with at least one intermediary, acknowledging that radio operators and online platforms make it easier for customers to order rides. However, drivers criticize these intermediaries, particularly online platforms, for trying to push down fare prices. While 44% of drivers view radio operators as having an overall net positive impact on their work, only 25% feel the same about online platforms, with 53% seeing their impact as negative. Even among drivers working with platforms, 91% believe these organizations try to lower fares, and 45% consider their overall effect negative.

Regarding collective action, we find that many drivers are politically engaged and regularly interact with other drivers. However, trade union membership among taxi drivers is low and a significant reason appears to be a lack of trust in unions' ability to improve their income and working conditions. Nevertheless, 88% of non-unionized employees see the need for a strong union to represent their interests, and 77% desire more union support in political matters, indicating a clear demand for union representation.

Drivers also identified several challenges in their work, with financial concerns like high gas prices, taxi tariffs, and taxes being top priorities. Other significant issues for at least 80% of respondents include referral fees charged by platforms, bureaucratic requirements, the political representation of drivers, price competition from platforms, taxi license non-renewal for traffic violations, and the collective minimum wage for drivers.

The comparative analysis highlights that platform work in Austria is highly gendered, with male-dominated ride-hailing and food-delivery services and female-dominated domestic and care services. Across industries, workers appreciate the autonomy and flexibility of their jobs, but common challenges include inadequate pay and safety concerns, particularly for female workers.

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1 Introduction

Platform and online work continue to attract significant attention from researchers and policymakers due to reports about low pay, problematic working conditions including exposure to intrusive digital monitoring practices and algorithmic management, and limited opportunities for workers to collectively negotiate their terms and conditions with platforms (Stewart & Stanford, 2017; Eurofound, 2019). Despite the increasing importance of these industries, cross-country and cross-sector comparative empirical evidence of how workers perceive their conditions and what they regard as the biggest challenges regarding their work remains scarce in many cases, because the industry continues to develop and change at a rapid pace and different legal and industrial relations contexts make it difficult to extrapolate findings from one country or industry to others.

Against this background, the “Driver Survey - Working conditions and collective action in the platform-based ride-hailing sector and beyond” project set out to collect evidence on platform-work in the Austrian taxi and ride-hailing industry. The ride-hailing industry is one of the platform industries attracting most scholarly and policy attention globally, but data on the Austrian case remains limited, with little empirical effort to compare the situation in the sector with other recent studies on platform work in other sectors in Austria.[1]

In Austria, since 2021, only individuals who have a valid taxi driver licence are allowed to provide services through online ride-hailing platforms. Therefore, as the first part of the project, we surveyed employed and self-employed taxi drivers in Austria covering the topics of income and working conditions, cooperation with ride-hailing company intermediaries, collective action and challenges at work. The survey was conducted online from September 2023 to January 2024 and offered in five languages (German, Turkish, Bosnian/Croatian/Serbian, Arabic and English) and disseminated through various channels with support from the project partners and other industry actors. The target population group of our survey were individuals driving taxis in cities in which the two biggest ride-hailing platforms in Austria – Uber and Bolt – are active, namely Vienna, Salzburg and Graz. Overall, 241 drivers, mostly from Vienna (76%) completed the questionnaire.

[1] An important exception is the work of Griesser et al., which we include in our comparative analysis (Griesser, Gruber-Risak, Herr, Plank, & Vogel, 2023).

The findings show that most drivers enjoy the autonomy and flexibility of their work but have mixed feelings about their working conditions, with only a quarter satisfied with their income. While three-quarters of drivers work with intermediaries like radio operators and online platforms, they criticize these platforms for pushing down fares. Radio operators are seen more positively, with 44% of drivers viewing their impact as beneficial, compared to only 25% for online platforms. With respect to collective action, we find that many drivers are engaged and interact with peers, but that union membership is low, likely due to distrust in unions' ability to improve conditions. Lastly, drivers face several challenges, particularly financial ones such as high gas prices, taxi tariffs fare rates that they view as too low (see Chapter 2.2), taxes, and platform fees. Other concerns include bureaucratic demands, lack of political representation, price competition from platforms, challenges in renewing taxi licenses, and minimum wage concerns.

In the second part of the project, we compared our survey's results with recent research on platform and online work in other industries – food-delivery, cleaning, care and online-work – in Austria along four dimensions: working conditions, dependency on income from platform work, collective action and workforce composition. The comparative analysis highlights that platform work in Austria is highly gendered, with male-dominated ride-hailing and food-delivery services and female-dominated domestic and care services. Across industries, workers appreciate the autonomy and flexibility of their jobs, but common challenges include inadequate pay and safety concerns, particularly for female workers. Workers' dependencies on their income from platform work seem to vary across industries as does trade union membership and the extent of collective bargaining.

The report is structured as follows: Chapter 2 presents a brief overview of the Austrian taxi and ride-hailing industry. Chapter 3 describes the methodology of the survey and chapter 4 presents the survey results. Chapter 5 describes the comparative analysis and outlines its findings. The final chapter draws conclusions and suggests policies for social partners and public policy makers.

2 The Austrian taxi and ride-hailing sector

In 2023, the year in which our survey was primarily conducted, there were 6 549 taxi companies in Austria, 2 490 of which were in Vienna (WKO, 2024), employing 14 001 and 5 609 individuals respectively.[2] In addition, there were 5 492 self-employed taxi drivers in 2022, the latest year for which data is available.[3] We are not aware of any public data on the number of Uber or Bolt drivers. However, a representative survey of the Viennese population aged 18-64 in 2020 found that customers use Uber and similar platforms as often as regular taxis (Saupe & Schörpf, 2021).

The following sections provide an overview of key aspects of the Austrian taxi and ride-hailing industry. These include the role of platforms, an explanation of relevant passenger transport regulations, the collective bargaining agreement for the ride-hailing sector, and the relevant social partner organizations that represent taxi drivers' interests.

2.1 Traditional and new intermediaries

In this project, we distinguish between two types of intermediaries connecting customers with drivers. The first type is the "traditional" intermediaries that have been operating in major Austrian cities for decades. They function via telephone centres where customers can call to order a taxi. We refer to these intermediaries as radio operators (*Funkzentralen*) and they include the companies such as Taxi 40100 and 31300 in Vienna, Taxi 81-11 in Salzburg and 878 in Graz.

The second type is online platforms, most notably Uber, Bolt and FreeNow. These companies entered the Austrian market only recently: FreeNow in 2011, followed by Uber in 2014 and Bolt in 2017 (named Taxify until 2018) (Bundeswettbewerbsbehörde, 2020). Notably, their arrival caused significant upheaval in the Austrian taxi market. The Uber and Bolt cooperated with companies and drivers in the rental car industry (*Mietwagengewerbe*) which were not subject to the same price regulations as the taxi industry (Bundeswettbewerbsbehörde, 2020). This led to several large-scale demonstrations by Viennese taxi drivers against what they saw as unfair competition by Uber and Bolt (ORF.AT, 2018; ORF.AT, 2016) and eventually resulted in several reforms of the Occasional Transport Act

[2] Arbeitsmarktinformationssystem (amis). „Unselbständige Beschäftigte" and „geringfügige Beschäftigte" in ÖNACE4 category „H 49.32 – Betrieb von Taxis"

[3] Leistungs- und Strukturstatistik (LSE) – „Beschäftigte" and „Selbstständig Beschäftigte" in ÖNACE category „H 49.32 – Betrieb von Taxis"

(*Gelegenheitsverkehrsgesetzt – GelverK*). The GelverK merged the taxi and rental car industry into a single passenger transport industry from 2019 onwards (*Personen-beförderungsgewerbe*) (Bundeswettbewerbsbehörde, 2020). As a result of the reform, traditional radio operators and online ride-hailing platforms are now regulated by the same laws which means that since January 2021 both types of intermediaries can only work with licenced taxi drivers, and both are subject to local taxi tariffs that regulate fare prices (see next section).

In terms of their utility, both types of intermediaries provide similar services, namely arranging passenger transport services with taxis. Furthermore, both types of companies do not employ drivers directly but rather cooperate with self-employed taxi drivers as well as with taxi companies which employ drivers. In recent years and with the increasing role of online ordering via apps, both types of intermediaries have become more similar in terms of technology and pricing. As the name implies, initially radio operators were called by customers via telephone which then used voice radio to contact drives, matching them with customers. Nowadays, all major radio operators in Vienna (Taxi 40100, 31300 Funk-Taxi), Graz (Taxi 878) and Salzburg (Taxi 81-11) continue to operate call centres but also have their own apps through which customers can order and pay for rides directly. Regarding pricing, taxis called through radio operators traditionally ran a meter to determine the fare price in line with local taxi tariffs, if applicable. Following the GelverK reform, the two large Viennese radio operators and Taxi 878 in Graz today offer customers the option to call rides for a fixed price in the same way as it is the case for online platforms.

Despite their similarities, there are still important differences between the two types of intermediaries. The first is the geographical scope within which they operate. While online platforms like Uber and Bolt are active globally, traditional radio operators in Austria are active only within a geographically constrained area, usually one city such as Vienna, Graz or Salzburg. In addition, radio operators tend to offer more comprehensive services to drivers than online platforms do. For example, both Taxi 40100 and 31300 Funk-Taxi offer preparatory courses for the taxi licence exam and Taxi 40100 publishes an Austria-wide newsletter for taxi drivers ("Hallo A-Taxi").

In addition to the differences in terms of geographical scope and services to drivers, there is anecdotal evidence of drivers having different views of both kinds of operators. In social media chatgroups and in a focus group we organised for this study (see chapter 3), drivers complained about not being shown the route and fare price before accepting drives in the online intermediaries such as the Uber app. Consequently, they sometimes felt tricked into accepting financially disadvantageous drives – a charge not usually levied against radio operators. Another common complaint among drivers, distinguishing between the intermediaries, is that online platforms try to systematically push down fare prices by exploiting the option of offering fixed-prices fares at 20% below the regular taxi tariff in Vienna (Griesser, Gruber-Risak, Herr, Plank, & Vogel, 2023) (see also next section).

Furthermore, there is evidence in the literature and concern among policymakers regarding the use of algorithmic management and digital monitoring practices in the platform industry (Veen, Barrat, & Goods, 2020; Wood & Lehdonvirta, 2022). Algorithmic management can thereby be understood as automated decision-making processes based on data collected by workers' apps and from customer evaluations which to the workers are often opaque and difficult to appeal. A related concern is that by 'gamifying' workers' experiences through the design of apps and the strategic use of notifications and promotions, digital labour platforms induce and mentally coerce drivers into driving more and longer hours than they intend to (Pignot, 2021).

Against this background, our survey included a series of questions regarding both types of intermediaries to help us analyse the extent to which there continue to be indeed measurable differences in how drivers cooperate with and perceive those intermediaries.

2.2 Price and wage regulations

Fare prices for customers are regulated in most of the bigger Austrian cities. The Occasional Transport Act empowers the governors of the Länder (*Landeshauptmann*) to impose binding taxi tariffs for municipalities under their jurisdiction (§14(1) GelverK). Such tariffs have been introduced in the three cities our survey focused on: Vienna, Graz and Salzburg. The tariffs regulate the fare that customers can be charged and usually consist of a basic amount (paid for each drive), payment rate per kilometre and possible surcharges on the fare, for example for nights or holidays. The Viennese tariff[4] further allows drivers and intermediaries to offer drives at fixed prices for up to 20% above or below the regular amount to be charged for a given distance, if the drive was booked in advance by phone or through an app. Drivers approached directly at a taxi stand or flagged down on the street, in contrast, are not allowed to deviate from the regular amount.

The minimum salary and standard working hours of taxi drivers who are employed by a taxi company are laid down in collective agreements which are negotiated between the Austrian trade union federation and the trade union Vida and the association for the passenger transport industry within the Austrian chamber of commerce.[5] Currently, there is one agreement at the federal level (*Bundeskollektivvertrag*) which regulates minimum pay and working conditions and the option for additional state-level agreements (*Landeskollektivvertrag*) which primarily define daily allowances. In 2023, the year in which our survey was primarily conducted, the collectively agreed minimum gross salary was 1 705€ to be paid 14

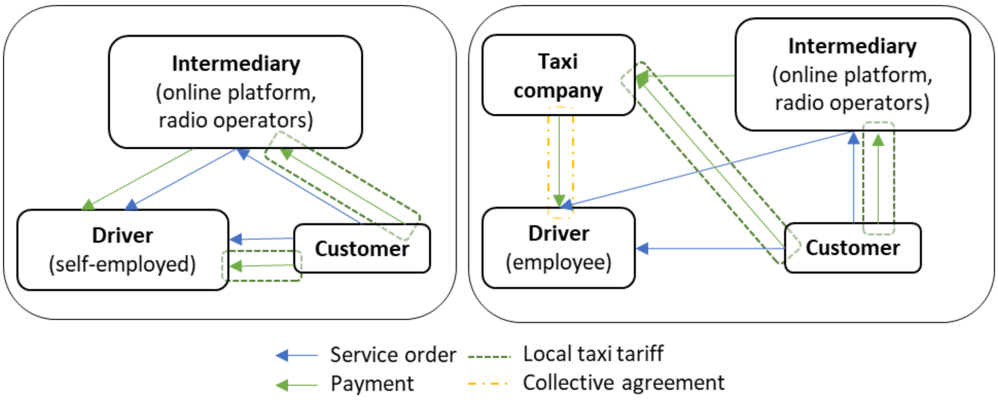
[4] https://www.wien.gv.at/wirtschaft/gewerbe/taxitarif.html#hoehe

[5] Fachverband für die Beförderungsgewerbe mit Personenkraftwagen

times per year. The regular daily shift was 12 hours, and the regular weekly working time was 55 hours. Employed drivers are paid by their employer, regardless of whether their customers contact them directly or are referred to them by a platform or radio operator. This means they should always be paid at least the collectively negotiated minimum wage.

In contrast, the referral fees charged by intermediaries to taxi companies and to (solo)self-employed taxi drivers that they cooperate with are not regulated and can freely be negotiated by the parties involved unlike the fare prices and minimum wages for employed drivers. The economic relationships between employed and self-employed drivers, customers and intermediaries and whether and how they are regulated (including local taxi tariffs) are visualised in Figure 1.

Figure 1: Economic relationships in the Austrian taxi industry in areas with taxi tariffs



Customers can contact drivers directly, for example, at a taxi stand, by hailing a taxi on the street, or by calling a driver directly if they have the driver's number (blue arrow). Self-employed drivers (left side of Figure 1) are paid directly (green arrow), and the fare, which determines the driver's income, is regulated by the local taxi tariff (dashed line around the green arrow). For employed drivers, the fare is paid to the taxi company, which in turn pays the driver's salary. The fare is regulated by the taxi tariff (green dashed line), and the salary is determined by the collective agreement (yellow dashed line).

For rides ordered through intermediaries, most intermediaries using apps also process the payments. Customers pay the intermediary, which forwards the fare—minus a commission fee—to the driver (if self-employed) or the taxi company (if the driver is employed). [6]The fare paid by customers is also regulated by the taxi tariff. As mentioned earlier, the salary of employed drivers must always meet or exceed the statutory minimum wage. However, the commission fees charged by intermediaries

[6] If intermediaries do not process the payment, as is usually the case with telephone orders via radio centres , customers pay the driver/taxi company, who then pays a fee to the intermediary for the arrangement (not shown).

are not regulated. Therefore, the amount that self-employed drivers or taxi companies earn from rides mediated by an intermediary depends on the conditions they are able to negotiate with the intermediary.

The Austrian regulations described above have been criticized on two grounds. First, some taxi drivers in a focus group conducted for this project (see chapter 3) complained that the option to offer fares 20% below the regular minimum tariff provides intermediaries with an unfair competitive advantage over taxi drivers who wait at taxi stands or are hailed down on the street. This sentiment aligns with a representative survey of Vienna residents from 2020, in which 61% of respondents agreed that Uber and similar platforms make it harder for regular taxi service providers to attract enough customers (Saupe & Schörpf, 2021).

Second, there is a concern – voiced inter alia by the European Commission's executive vice-president Margrethe Vestager, that digital labour platforms may gain a dominant negotiating position vis-à-vis (solo) self-employed providing services through them and, thereby, be able to dictate terms to the latter. Therefore, the Commission in 2022, for instance, adopted new guidelines on the application of EU competition law to allow solo self-employed under certain conditions to collectively negotiate terms with platforms (European Commission, 2022).

To gauge opinions on the existing rules, the survey included questions about the taxi tariff, the amount of commission fees, and the regulation of commission fees either legally or through collective bargaining.

2.3 Social partner organisations representing taxi drivers

All self-employed taxi drivers and taxi companies are members of the Austrian Chamber of Commerce in which they are organised within the sectoral group of transportation with passenger cars (*Fachbereich Beförderungsgewerbe mit Personenkraftwagen*). Online ride-hailing platforms and radio operators are organised within the same sectoral group, which is also the group that negotiates the collective agreement for employed drivers.

Employed taxi drivers,solo self-employed drivers, and self-employed drivers with up to four employees can all join the trade union *vida*, which organises workers in the road and transport sector. The Austrian trade unions have, since the 2000s, made deliberate attempts to recruit and expand their services beyond their traditional clientele of employees to dependent self-employed (Pernicka, Organizing the self-employed: theoretical considerations and empirical findings, 2006). Vida joined these efforts by creating the initiative vida*flex*[7], with the declared aim to represent the interests of and provide services to solo self-employed. However, despite these efforts and the successful negotiation of a collective agreement for taxi drivers, trade union membership in the industry is very low. Vida counts only 126 taxi drivers among their members[8] which equates to a unionization rate among employed taxi drivers of only 0.98% - much less than the average union density in Austria of 26.3% (2019) (OECD and AIAS, 2023).

To explore the reasons behind low membership numbers, union members were asked about their motivations for joining, while non-members were questioned about the factors they perceive as barriers to membership.

[7] https://www.vidaflex.at/

8 Numbers provided by vida in private correspondence in March 2023.

3 Methodology

This chapter details the survey's design and development process, the execution of the pilot study, the dissemination strategies employed, and the survey's representativeness and limitations.

3.1 Survey design and development

The survey questionnaire consisted of 82 question items covering topics on income and working conditions, cooperation with intermediaries (both online platforms and radio operators), collective action, work-related challenges, the reform of the Occasional Transport Act, undeclared work, and socio-demographic characteristics of the drivers.

The questionnaire was developed in collaboration with Kurt Vandaele from the European Trade Union Institute (ETUI), the Association of Passenger Carriers at the Austrian Chamber of Commerce[9], and the transport and services union vida.[10] Additionally, input from a focus group with eight employed and self-employed taxi drivers in Austria conducted in March 2023 was incorporated into the questionnaire design. To enable comparisons with existing studies, we included question formulations from international social survey projects such as the European Working Conditions Survey and the European Social Survey. Furthermore, some questions on collective action among employed and self-employed taxi drivers were adapted from existing studies on platform work (Vandaele, Piasna, & Drahokoupil, 2019a; Vandaele, Piasna, & Drahokoupil, 2019b; Geyer & Prinz, 2022).

The survey was available in German, English, Turkish, Bosnian/Croatian/Serbian, and Arabic, with translations done by professional translators. It was implemented using LimeSurvey, with a mobile-friendly version to facilitate easy completion on smartphones. Respondents were asked at the start about their gender (male/female/I don't want to say) and employment status (employed/self-employed) and were subsequently addressed accordingly. This means that employees were asked about their work as employed drivers ("*Taxilenker*") and self-employed about their work as self-employed drivers ("*selbstfahrender Taxiunternehmer*"). A copy of the full English and German questionnaire is available on our website.[11]

[9] Fachverband Beförderungsgewerbe mit Personenkraftwagen

[10] Verkehrs- und Dienstleistungsgewerkschaft vida

[11] https://www.euro.centre.org/projects/detail/4545

3.2 Pilot study

We conducted a small-scale pilot study to assess the comprehensibility and clarity of the questions, as well as the overall user-friendliness across different devices of the online survey. Twelve individuals participated in the test run, including employed and self-employed taxi drivers, a representative from the Austrian Chamber of Commerce, and researchers from the European Centre of Social Welfare Policy and Research not involved in this study.

3.3 Dissemination

The survey's target group were employed or self-employed individuals driving taxis in cities in which the two biggest ride-hailing platforms in Austria – Uber and Bolt – are active, namely Vienna, Salzburg and Graz. Taxi entrepreneurs who do not drive themselves were excluded from our target group. The survey was made available online from early September 2023 until the end of January 2024. To reach a large and diverse group of participants, we utilized multiple dissemination channels.

Our primary channels were newsletters from the Chambers of Commerce in Vienna, Styria, and Salzburg, letters to members of the trade union vida, and posts in various Facebook groups by both the Chamber of Commerce and researchers of the European Centre of Social Welfare Policy and Research. Additionally, we also used targeted advertising on Facebook. Approximately one-third of respondents were recruited through Facebook posts/advertisements and newsletters from the Chambers of Commerce, respectively.

We asked radio operators (31-300, 40-100, 81-11), interest groups of Turkish taxi drivers in Vienna[12], and the online platforms UBER and BOLT to disseminate the survey. However, we do not know to what extent the efforts of these actors have been successful. Furthermore, we distributed flyers to drivers at taxi stands in Vienna which allowed drivers to access the survey through a QR-code, requested employed and self-employed taxi drivers and entrepreneurs to forward our survey, and published an article in the Austrian Taxicab Newspaper (*Österreichische Taxizeitung - ÖTZ*).

As an incentive to complete the full survey, participants had the chance to win one of three 50€ vouchers at the end of the survey.

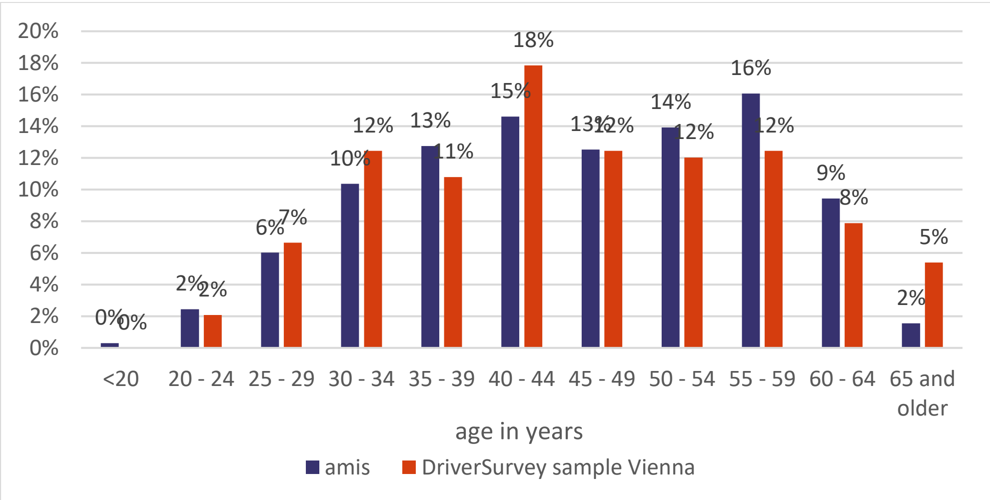
[12] Wiener Taxi-Gemeinschaft (https://www.wienertaxi-gemeinschaft.at/), Wiener Taxiverein

3.4 Representativeness and limitations

When distributing the survey, efforts were taken to reach a diverse group of employed and self-employed taxi drivers through a range of communication channels and methods as described before. Despite these efforts, we acknowledge that participation in the survey was not random, meaning the collected sample is not probabilistic and there are clear areas of over and underrepresentation.

First of all, since we only targeted three major cities – Vienna, Graz and Salzburg - in which platforms and radio operators are active, the sample is dominated by responses from these regions and not geographically representative for Austria at large. Secondly, self-employed taxi drivers participated at a higher rate in the survey, leading to an underrepresentation of employed taxi drivers. While self-employed account for about 30% and employees for about 70% of all employment in Austrian taxi industry, our sample presents the mirror opposite with 70% of respondents being self-employed and only 30% employees. Lastly, there is an overrepresentation of trade union members. This is likely due to the distribution method, as letters with an invitation to the survey were sent to trade union members. All three biases are clearly due to the dissemination methods, specifically the overall emphasis on Vienna, the WKO newsletters which are only sent to self-employed and vida's direct outreach to its members. To address these biases, we analysed responses to answers where different answers could plausibly be expected, for example regarding challenges at work, separately for the respective subsamples and reported any significant differences between them in Chapter 4.

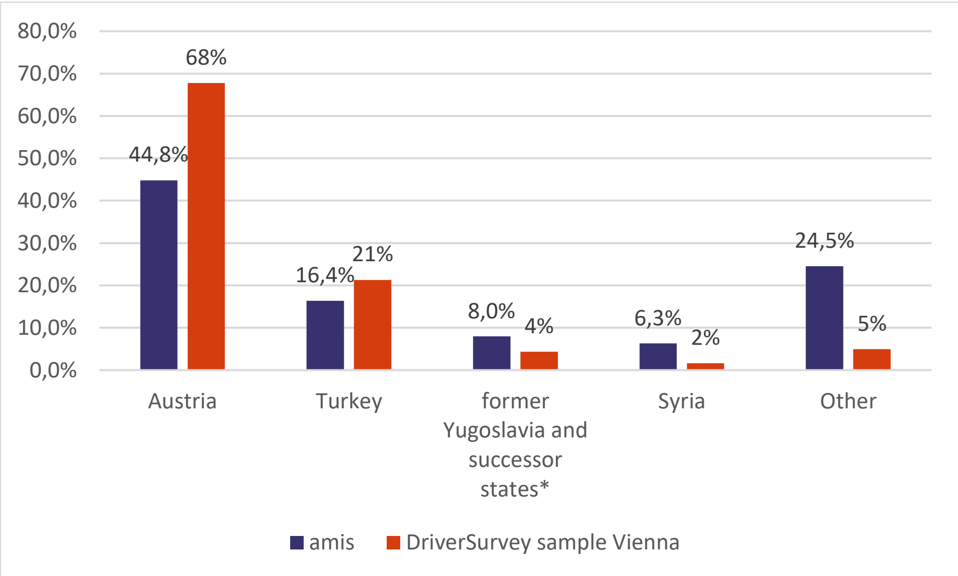
Figure 2: Representativeness of the survey sample in terms of age



Note: Data on dependent employees in Vienna's taxi industry was sourced from the Labour Market Information System (AMIS).

In contrast to the described biases regarding employment status and trade union membership, we see that our sample is largely representative of drivers in Vienna[13] regarding several demographic characteristics, namely age, citizenship, gender and company size. The age distribution of our survey participants closely mirrors the age composition of employed taxi drivers in Vienna, as illustrated in Figure 2. Regarding citizenship, our sample has a higher share of respondents with Austrian citizenship than employed drivers in Vienna at large (68% vs. 44.8%), but, like in official labour force statistics, the largest groups of foreign employed and self-employed taxi drivers are citizens of Turkey, approximately 17%, Yugoslavia and its successor states (Bosnia and Herzegozina, Croatia, Montenegro, North Macedonia, Serbia, Slovenia) and Syria (see Figure 3). Regarding gender, although there is a slight underrepresentation of female (employed and self-employed) taxi drivers in our sample when considering all of Austria, the sample is representative of the situation in Vienna. The gender distribution in our sample is approximately 10% female and 90% male, which aligns with the gender distribution of employed taxi drivers in Vienna (see amis). Furthermore, the share of different company sizes, which employ taxi drivers, seems to be representative of the industry, as shown in Table 1.

Figure 3: Representativeness of sample in terms of citizenship



Note: Data on dependent employees in Vienna's taxi industry was sourced from the Labour Market Information System (AMIS).

[13] We conducted the comparison only for Vienna which accounts for 75% of the responses because there is no city-level data for Graz and Salzburg and because we only receive a limited number of answers from those cities. However, we found no indications of additional sample biases in the sample for these cities either. To the contrary, the full sample is fairly representative in terms of age, gender, citizenship and country size for employment in the Austrian taxi industry at large.

Table 1: Representativeness of sample in terms of company size

	Industry Data	Driver Survey sample
0 - 9 employees	96%	95%
10 - 49 employees	4%	5%
50 - 249 employees	0%	0%
250+ employees	0%	0%

WKO industry data, companies 2023 by company size categories

Unfortunately, we are not aware of statistics on taxi drivers' cooperation with intermediaries which prevents us from assessing our sample's representativeness in this regard. However, there is neither an indication to suggest that users of certain platforms or radio operators are over or underrepresented in our sample nor that the sample is biased towards individuals with particularly positive or negative experiences with specific intermediaries.

To ensure the validity of the results, we presented our findings and preliminary conclusions to a diverse group of stakeholders in the sector, i.e. representatives from the Chamber of Commerce, the chamber of labour, a self-employed taxi driver, and the trade union Vida. Following these discussions responses to some questions considered implausible were removed. This step was crucial in verifying the validity of interpretations.

4 Results

This chapter presents the survey findings. We received a total of 640 responses. After removing incomplete and duplicated answers, we retained 241 complete responses from actively employed and self-employed taxi drivers.[14] Here, we first provide a detailed overview of the sample. We then present the results of our survey, from the modules on perceived income and working conditions of employed and self-employed taxi drivers and explore their cooperation with intermediaries. Then, we present the findings on collective action within the industry before exploring the results of what challenges drivers face at their work.

4.1 Sample

The questionnaire included questions on respondents' gender, employment status, place of work, job tenure as a driver, as well as expected job tenure, highest educational attainment, training status, nationality, country of birth, and age. Self-employed were also asked about their number of employees.

The results summarised in Table 2: Demographics of Driver Survey sample Table 2 show that most respondents in our sample are male, with just around 10% being female. 183 respondents (76%) work in Vienna, 22 (9%) in Graz, 9 (4%) in Salzburg and 27 (11%) in other cities. 70% work as self-employed taxi drivers, while the remaining 30% are employed taxi drivers. More than half of these taxi drivers operate as solo self-employed individuals. Among the self-employed, the number of employees ranges from zero (54%) to 42, with most having only a small number of individuals working for them. Only 10.8% of the self-employed respondents reported having more than 5 employees.

With regards to their career expectancy, most respondents reported that they will remain in the profession long term. More than two-thirds of respondents indicate that they want to continue to work as a taxi driver until their retirement. Among the 30% that do not plan to work in this job until they retire, only 12% expect to leave the profession within less than one year, while 57% expect to continue working for at least 4 more years.

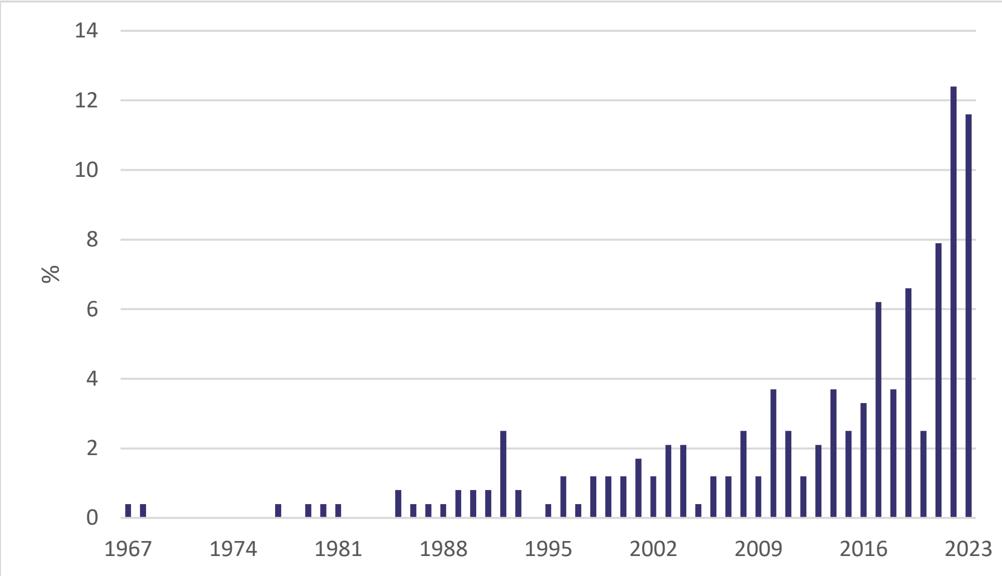
14 Since participants had the chance to win vouchers, there may was an incentive to complete the survey multiple times. Therefore, responses with identical IP addresses and similar answers were excluded.

Table 2: Demographics of Driver Survey sample

Characteristics of Driver Survey sample	N = 241
Gender	
Male	217 (90%)
Female	23 (10%)
Place of work	
Vienna	183 (76%)
Graz	22 (9.1%)
Salzburg	9 (3.7%)
Other	27 (11.4%)
Employment status	
Self-employed	170 (71%)
Employed	71 (29%)
Nr. of Employees (only self-employed)	
Min- Max, Median	0- 42; 3
Expected future job tenure (remaining in the profession until pension)	
Yes	167 (70%)
No	71 (30%)
Highest education	
University/college degree	41 (17%)
Other degree after Matura	5 (2.1%)
Technical/commercial school	34 (14%)
Apprenticeship with vocational training	67 (28%)
Matura	60 (25%)
Compulsory school	26 (11%)
Other	8 (3.3%)
Currently in education	
Yes, at university/college	3 (1.2%)
Yes, other education/training	10 (4.1%)
No	228 (95%)

The educational background of our sample of respondents is quite diverse, as illustrated in Table 2. 17% of participants hold a university degree or an equivalent qualification, while 25% have obtained a Matura (secondary-school leaving certificate). Additionally, 28% have completed an apprenticeship, and 14% have finished technical or trade school. Lastly, 11% have completed mandatory schooling as their highest level of education. 5% of respondents are currently in some form of training, with 1% being enrolled in a university degree program.

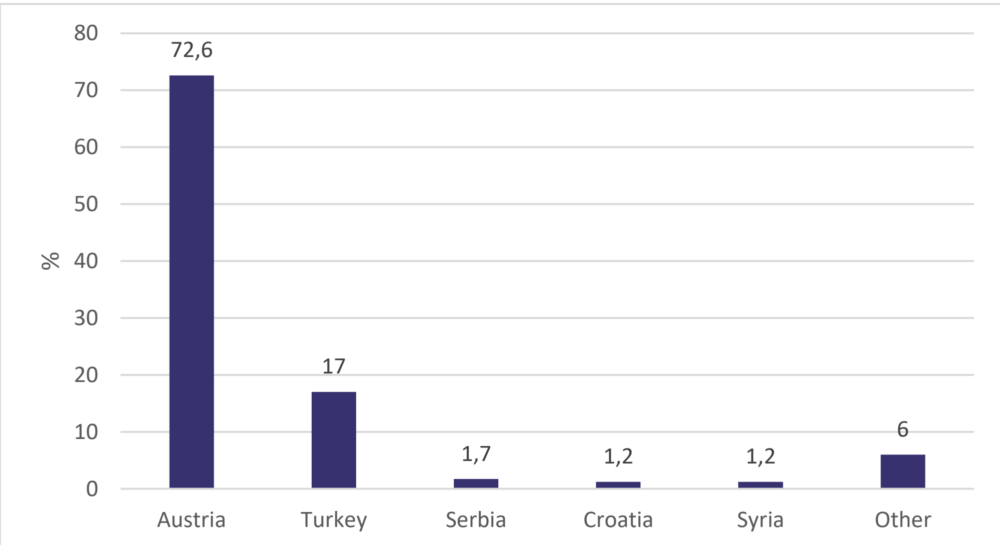
Figure 4: Starting year as taxi driver



37% of respondents worked for more than 10 years in the taxi industry (see Figure 4) and 55% for more than 5 years. Around one-third of the respondents entered the profession over the last three years.

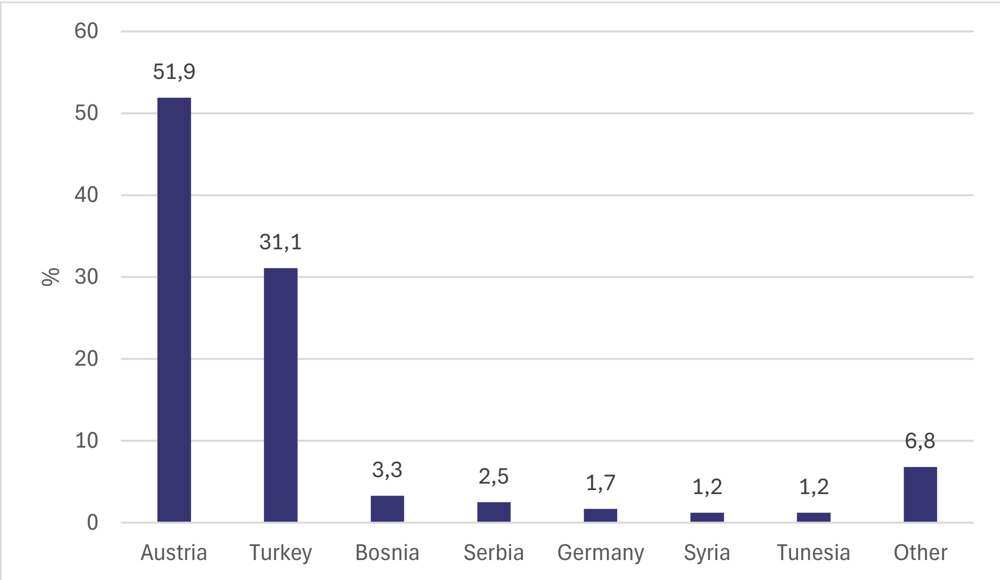
Over 70% of the respondents are Austrian citizens (see Figure 5). Among taxi drivers with foreign citizenship, the most common nationalities are Turkish (17%), Serbian

Figure 5: Citizenship status of the respondents



(1.7%), Croatian (1.2%), and Syrian (1.2%). There is a relatively higher share of respondents born in a foreign country than those with foreign citizenship, indicative of the volume of respondents with an immigration background (see Figure 6). Almost 50% of taxi drivers were born outside of Austria, with the most common countries of birth being Turkey, Bosnia, Serbia, Germany, Syria, and Tunisia. We also asked about the countries of birth of respondents' parents, which showed that more parents were born abroad than in Austria, with Turkey being the most common country of origin for both genders (40% of the mothers and 43% of the fathers). This seems to suggest a high share of second-generation immigrant Austrian citizens in our sample, which closely resembles the population. Further frequent birth countries of the parents are Bosnia, Serbia and Germany.

Figure 6: Country of birth of the respondents

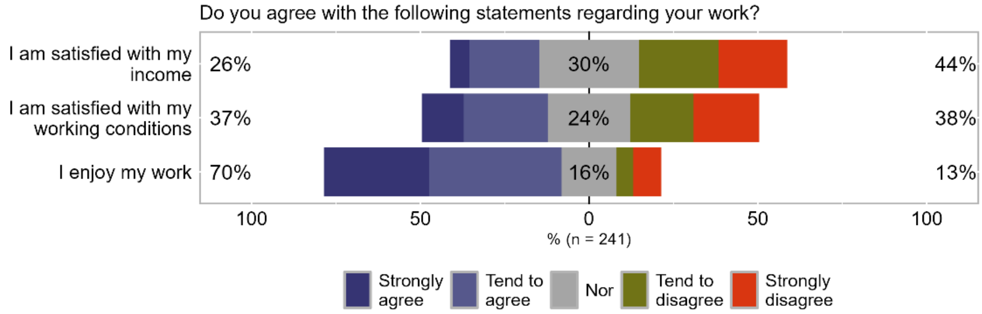


4.2 Income and working conditions

This chapter examines the income and working conditions of employed and self-employed taxi drivers as well as their motivations for doing this job. With regards to job quality, we follow the work of Goods, Veen, and Barratt (2019) on the indicators of job quality in platform work and, in addition to income and traditional aspects of working conditions like working hours and workplace safety, cover enjoyment and workplace autonomy.

Asked about their working conditions in general, 70% of the respondents agreed to the statement that they enjoy their work as taxi driver (see Figure 7). Contrary, less than half agree to the statement that they are satisfied with working conditions (37%). Less than a third are satisfied with pay (26%) and nearly half of the respondents indicate dissatisfaction with their income.

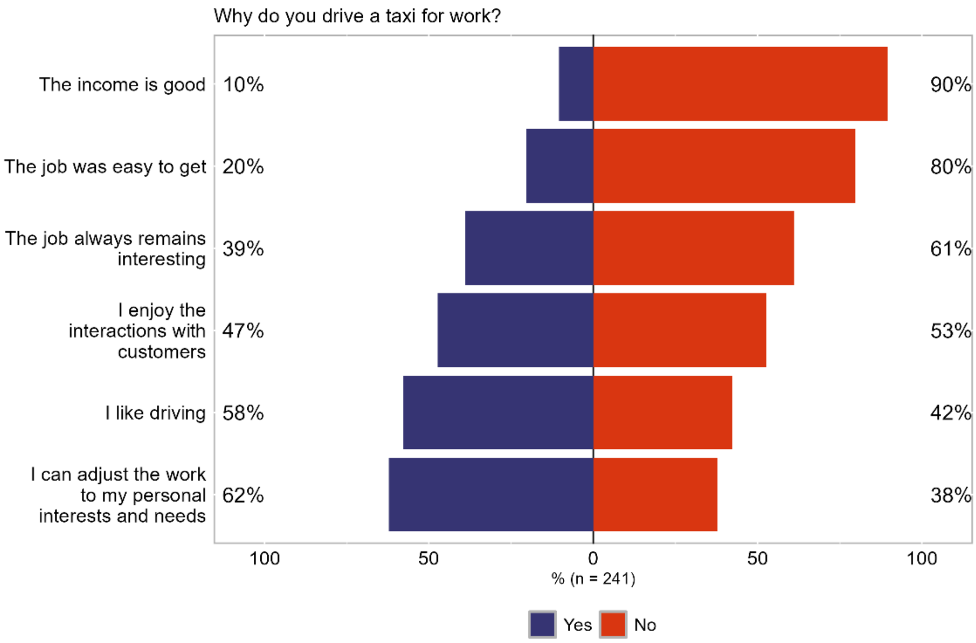
Figure 7: General satisfaction at work and with income



Note: The percentages on the left represent respondents who "strongly agree" or "tend to agree," while those on the right represent respondents who "tend to disagree" or "strongly disagree." The middle percentage reflects those who answered "neither agree nor disagree."

Variation between different groups is limited. Self-employed are on average slightly more satisfied with their income (32%), and working conditions (44%) and more likely to enjoy their work (73%) than the overall sample, while drivers cooperating with online platforms are marginally less satisfied with their pay (22%), conditions (32%) and less likely to enjoy their work (66%). However, these differences are in the range of single percentage points.

Figure 8: Reasons for working as taxi driver

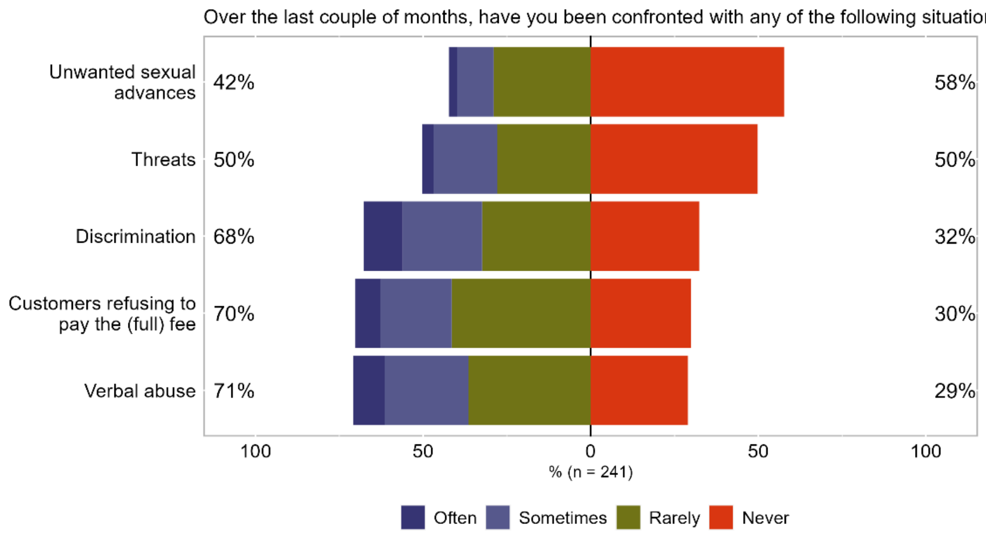


Respondents' reasons for working as taxi drivers show several reasons for why they enjoy their work. Most respondents named job flexibility, specifically their ability to adjust work to their personal interests and needs, their enjoyment of driving and interactions with customers as reasons for pursuing this line of work (see Figure 8). In contrast, only 10% said they were drawn to the profession because they considered the income good and just 20% mentioned doing the job because it is easy to get.

Despite enjoying their work, taxi drivers face certain degrading and dangerous situations on the job (Figure 9). Approximately 70% report having encountered verbal abuse and discrimination at least once within the last couple of months, with about one-third facing these issues regularly (sometimes or often). Additionally, drivers often deal with customers refusing to pay the (full) fare and 50% have experienced some form of threats at work. Unwanted sexual advances were the least commonly reported issue, with approximately 11% of respondents reporting experiencing them occasionally and 3% often. Respondents not born in Austria were more likely to report threats (+6 percentage points), refusal to pay (+8), abuse (+10), unwanted sexual advances (+15) and discrimination (+16), while the limited number of female drivers reported fewer incidence regarding all categories of degrading situations at work.

The latter finding is somewhat surprising because other research on platform work in Austria, for example in food delivery, found women to be more exposed to verbal abuse and unwanted sexual advances (Geyer & Prinz, 2022). However, the finding may easily be explained by the fact that only 25% of women drivers in our sample drive at night, when passengers are arguably most likely to be intoxicated and unwieldy, compared to 49% in the overall sample (see Figure 12). In other words, women drivers may strategically choose their working times to avoid unpleasant and potentially dangerous encounters.

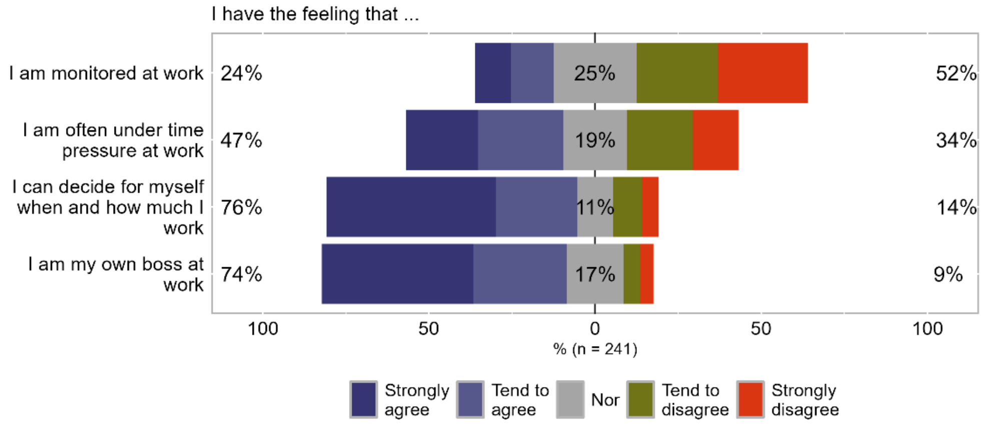
Figure 9: Degrading situations at work



Note: Percentages on the left are the share of respondents that answered “often”, “sometimes”, or “rarely”. Percentages on the right show the share of respondents that answered “Never”.

Autonomy and flexible working hours are often highlighted as positive aspects of platform work. Figure 10 shows the extent to which taxi drivers feel they can make autonomous decisions regarding their work and working hours. Most taxi drivers feel like they are their own boss (75%) and, likewise, most respondents state that they can freely decide when and how much they work (76%). However, around 50% often feel under time pressure at work. We also asked about monitoring which can reduce workers' (perceived) autonomy, but only about a quarter felt monitored to some extent at work while the majority (52%) did not.

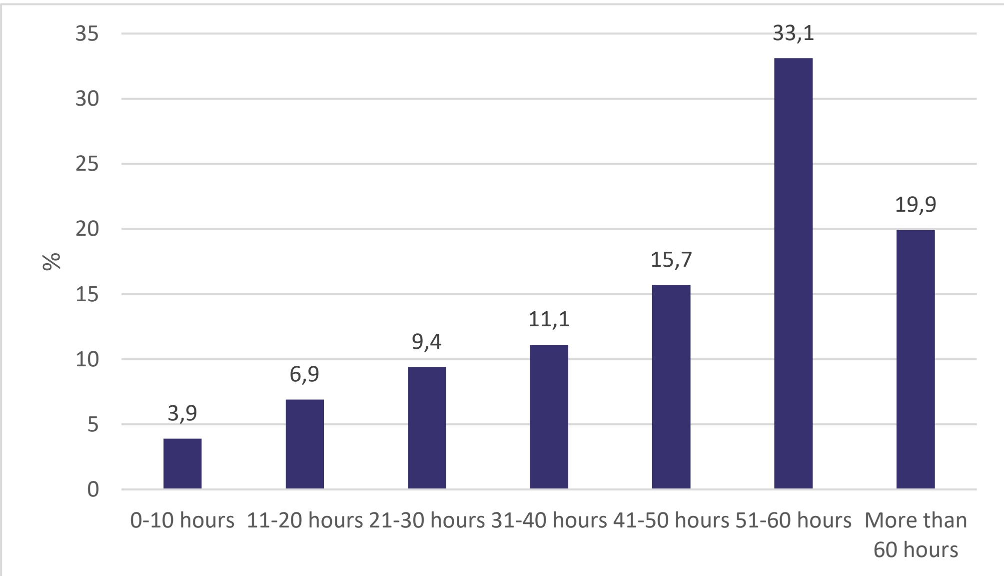
Figure 10: Autonomy at work



Note: The percentages on the left represent respondents who "strongly agree" or "tend to agree," while those on the right represent respondents who "tend to disagree" or "strongly disagree." The middle percentage reflects those who answered "neither agree nor disagree."

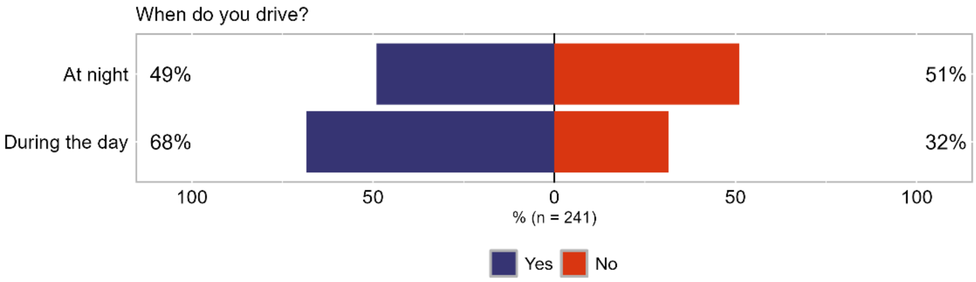
Most taxi drivers in our sample work about or more than full-time equivalent hours, suggesting that this job is their primary occupation (see Figure 11). Nearly 70% of respondents work more than 40 hours per week and 53% more than 50 hours. While these numbers are high, they are in line with the 60 hours of weekly working time laid down in the collective agreement. Only 20% work up to 30 hours per week, while approximately 11% work up to 20 hours weekly.

Figure 11: Weekly hours spent driving a taxi, including waiting times (N = 235)



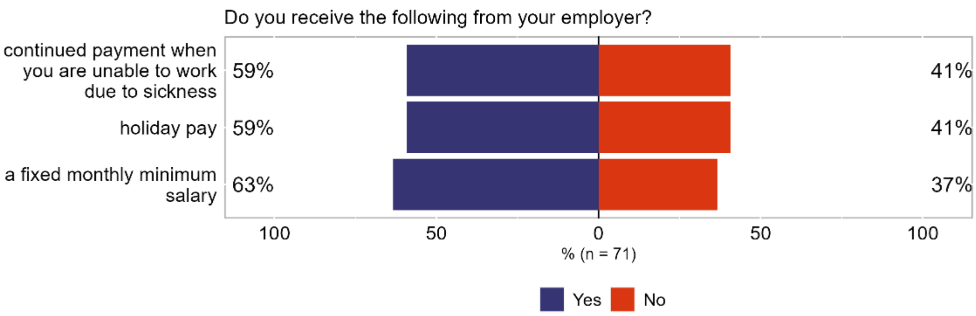
Looking at the working times of employed and self-employed taxi drivers shows that more taxi drivers work during the day than at night (see Figure 12). However, half of the respondents indicated that they also work during the night.

Figure 12: Working times



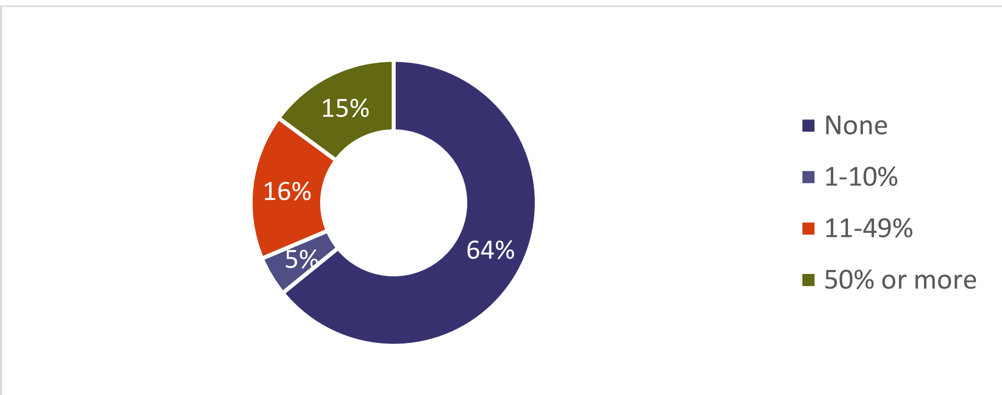
Turning to income and benefit entitlements, nearly all respondents (98%) are aware of the collective agreement for employed taxi drivers. However, only two-thirds of employed drivers answered that they receive sick pay, holiday pay and a fixed monthly minimum salary – benefits they are entitled to under the agreement and Austrian law (Figure 13).

Figure 13: Benefits of employed taxi drivers (N = 71)



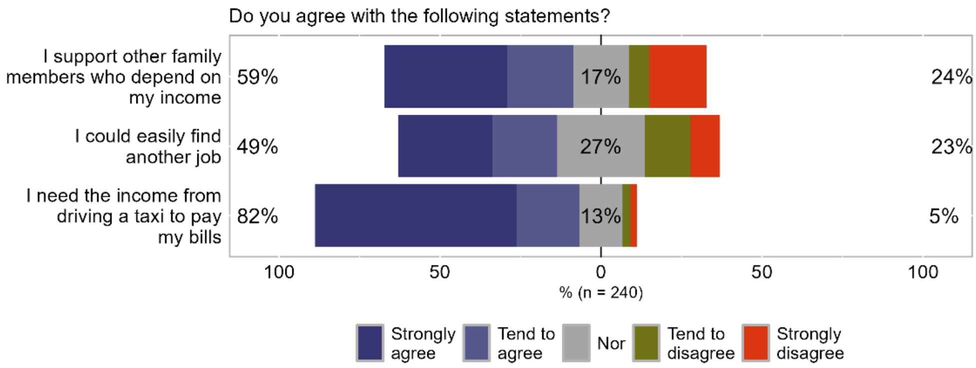
We also find that around one-third of employed drivers receive a share of the income they generate (see Figure 14). In other words, their income is partially dependent on the amount of revenue that they generate through fares.

Figure 14: Not counting tips, what percentage of revenue you generate do you receive? (only employed drivers, N = 67)



Lastly, we asked questions about drivers' dependency on their income from driving a taxi as such an income dependency on the job has been found to influence perceived job quality among platform workers (Schor, Attwood-Charles, Cansoy, Ladegaard, & Wengronowitz, 2020). The results show that the majority of taxi drivers (82%) rely on their earnings from taxi driving to cover their bills (see Figure 15) and that for slightly over half of the respondents, this is their only source of income (Figure 16). Only 2% receive government support like unemployment benefits, 19% receive support from family members and 22% from a different job. Additionally, nearly 60% state that they support other family members with their income from taxi driving, while only 23% disagree with this statement.

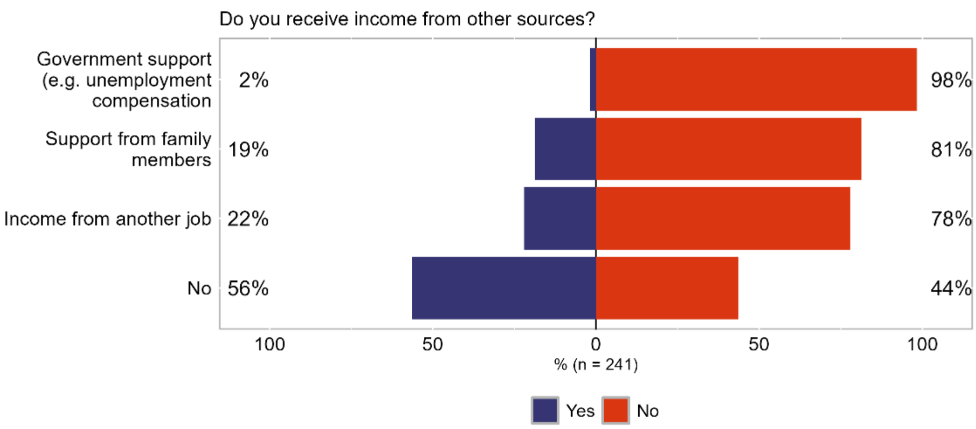
Figure 15: Dependency on income as taxi driver (N = 240)



Note: The percentages on the left represent respondents who "strongly agree" or "tend to agree," while those on the right represent respondents who "tend to disagree" or "strongly disagree." The middle percentage reflects those who answered "neither agree nor disagree."

These results show that for most respondents driving a taxi for work is the primary occupation and source of income on which they rely for their livelihood and, in many cases, that of family members. Despite such reliance on their profession for their livelihood, half of all respondents also agreed with the statement that they could easily find another job.

Figure 16: Other income sources

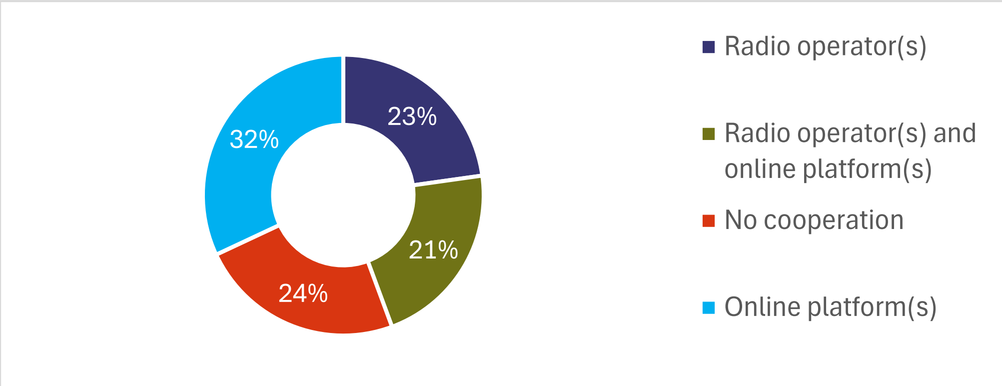


4.3 Cooperations with intermediaries

In this chapter, we explore respondents' collaborations with intermediaries. As discussed in chapter 2, online platforms and traditional intermediaries are subject to the same legal framework, but it is still plausible to expect that there would be differences in the way they are perceived by drivers. Therefore, in our survey, we distinguished between "*intermediaries that only provide online services (online platforms such as UBER and Bolt)"* and, on the other hand, *"Traditional intermediaries (radio operators or "Funkzentralen" in German) who refer clients to drivers by telephone or by telephone and through apps like Taxi 40100, 31300, 81-11, 2801, 878 or 5311."* Drivers were asked the same set of questions about each type of intermediary.

Most employed and self-employed taxi drivers cooperate with at least one or more intermediaries (see Figure 17) and only 24% of respondents in our sample cooperate with none. Among those using intermediaries, 23% work exclusively with radio operators, 32% with one or more online platforms and 21% of taxi drivers have partnerships with both radio operators and online platforms.

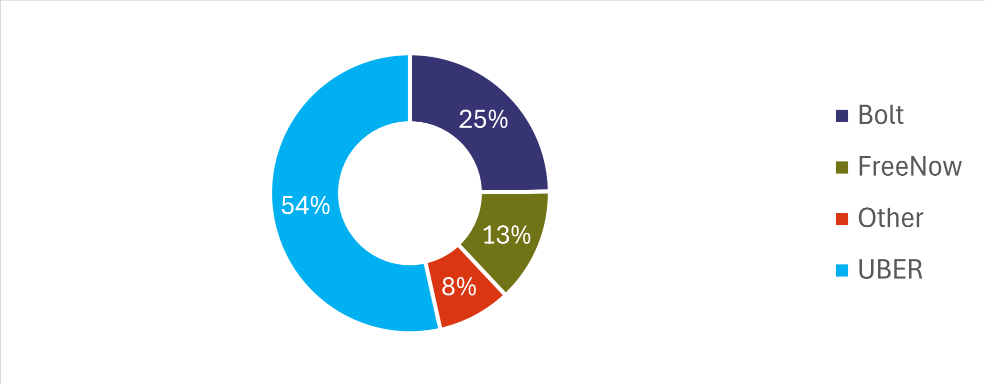
Figure 17: Cooperations with intermediaries



4.3.1 Online platforms

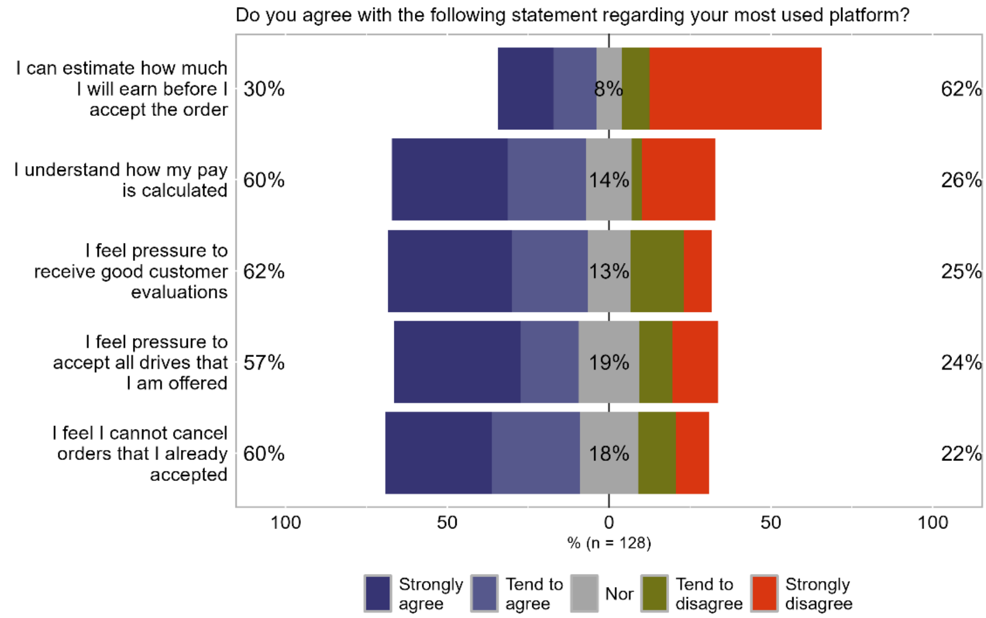
Among the 129 taxi drivers in our sample who use online platforms, we have also asked their most used platform. 54% of respondents stated that their most used platform is UBER. Bolt is the most used platform for about 25% of those who cooperate with online platforms, and FreeNow is used by 13% of taxi drivers. They may use other platforms as well, but this information was not collected by our survey.

Figure 18: Most used online platform, users only (N = 129)



We asked respondents several questions about their attitudes toward the platform they use most often. In the first set of questions, drivers were asked to what degree they agree or disagree with statements related to the transparency or opaqueness of the payment model, the salience of customer ratings and drivers' perceived autonomy in accepting and declining orders (Figure 19).

Figure 19: Statements about online platforms I, use the most (N = 128)

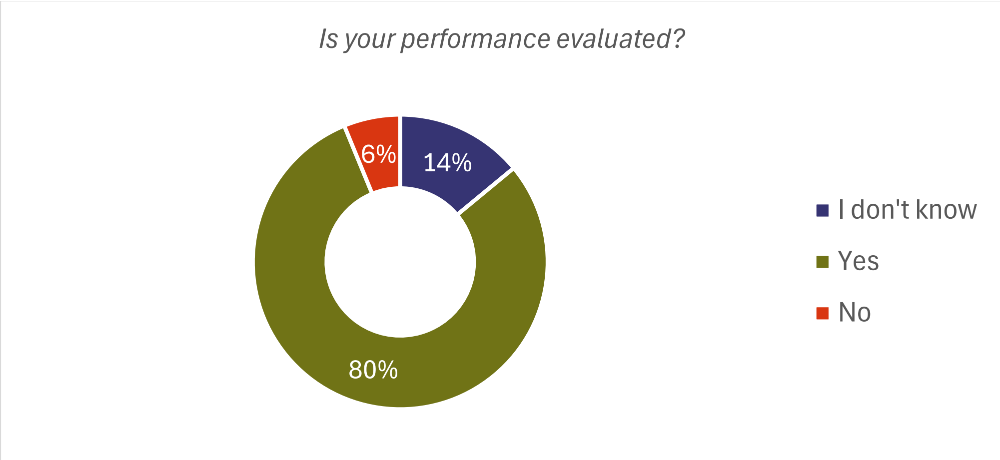


Note: The percentages on the left represent respondents who "strongly agree" or "tend to agree," while those on the right represent respondents who "tend to disagree" or "strongly disagree." The middle percentage reflects those who answered "neither agree nor disagree."

62% of respondents stated that on the platform they use most often, they cannot estimate how much they will earn from an arranged ride before accepting it. However, 60% of drivers do understand how their pay is calculated when cooperating with an online platform. A notable aspect of working with online platforms is the pressure drivers feel. More drivers report feeling pressured to receive good customer reviews or to accept all ride requests from online platforms than those who feel no pressure at all. Similarly, 60% feel that they cannot cancel an order from an online platform once it has been accepted.

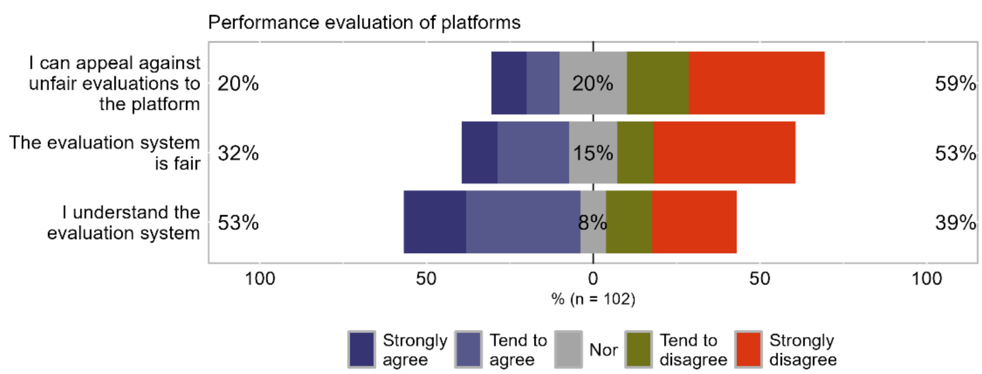
As discussed in Chapter 2, performance evaluations are another contentious topic in discussions on platform work. In our sample, 80% of taxi drivers using online platforms stated that their performance is assessed by their most-used online platform, with only 6% saying that this is not the case (Figure 20).

Figure 20: Performance evaluation of online platforms (N = 129)



Amongst those who know that their performance is evaluated, nearly 60% feel that they cannot appeal against unfair evaluations from these platforms, and more than half believe that the evaluation system is rather unfair. However, the evaluation systems seem fairly transparent as respondents were more likely than not to say that they understood it.

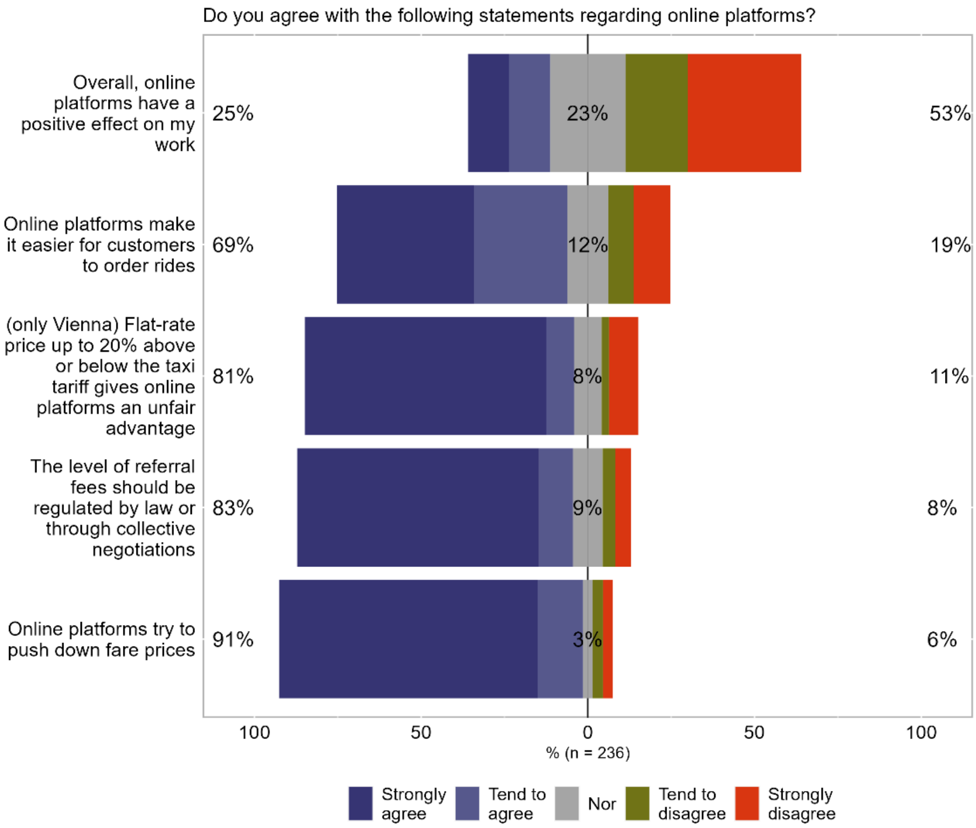
Figure 21: Evaluation systems of online platforms (N = 102)



Note: The percentages on the left represent respondents who "strongly agree" or "tend to agree," while those on the right represent respondents who "tend to disagree" or "strongly disagree." The middle percentage reflects those who answered "neither agree nor disagree."

We asked all respondents – not only those who personally work with online platforms – about their general perceptions regarding online platforms (Figure 22). The results show that more than half of the respondents from our total sample believe that online platforms have a negative impact on their work as taxi drivers. Despite this, a clear majority (69%) acknowledge that online platforms make it easier for customers to order rides. This sentiment is even more pronounced in Vienna, where 74% agree, compared to 54% in the rest of Austria. Furthermore, the vast majority of taxi drivers (83%) believe that the level of referral fees charged by online platforms should be regulated by law. Over 90% of both employed and self-employed taxi drivers state that online platforms actively try to push down fare prices.

Figure 22: General attitudes towards online platforms (N=236)



Note: The percentages on the left represent respondents who "strongly agree" or "tend to agree," while those on the right represent respondents who "tend to disagree" or "strongly disagree." The middle percentage reflects those who answered "neither agree nor disagree."

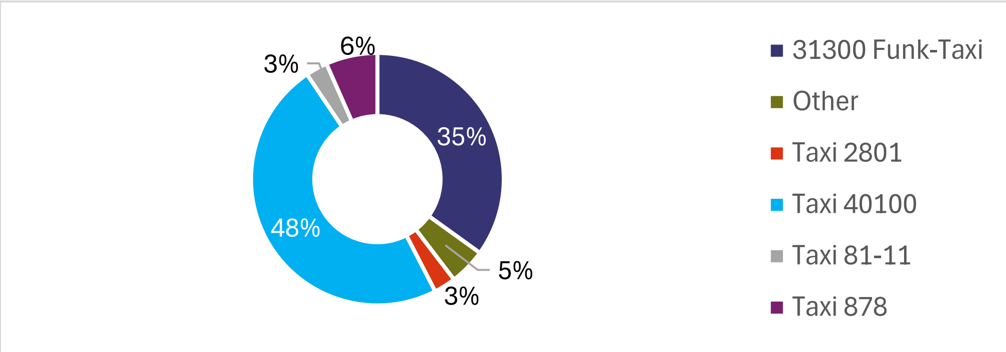
Finally, drivers active in Vienna were also asked about the local "price band" where 81% agreed with the following statement: "*The option to offer rides for a flat-rate price up to 20% above or below the taxi tariff gives online platforms an unfair competitive advantage.*"

Interestingly, the general attitudes towards online platforms (as shown in Figure 22) are similar when only responses from the 126 taxi drivers who use online platforms are considered – arguably the potential winners of their presence. Among this group, the overall effect of online platforms is viewed more positively with 34% agreeing that they have a positive effect on their work and a slightly smaller group than in the overall sample, 45%, disagreeing with this statement. Drivers who use platforms are also more likely to agree with the statement that online platforms make it easier for customers to order rides (84% agree). Regarding the other three statements – online platforms try to drive down prices, have an unfair competitive advantage and fees should be regulated – the answers of the platform users are almost identical to those of the overall sample.

4.3.2 Radio operators

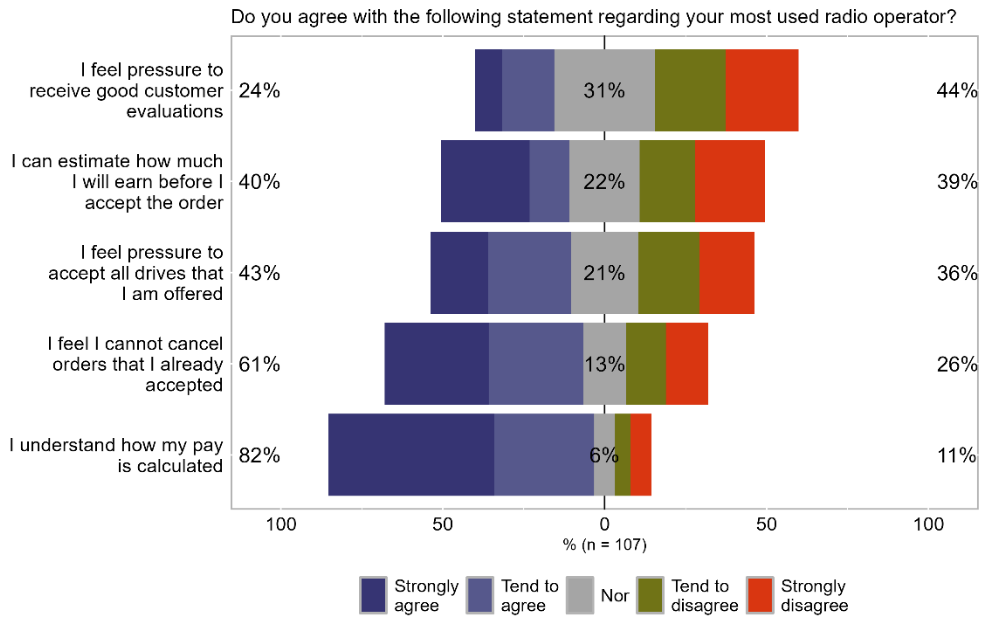
Turning to radio operators, we find that Taxi 40100 and 31300 Funk-Taxi are the most used radio operators, of about 48% and 35% of the respondents working with either radio operator naming them respectively. These operators are followed by Taxi 878 (6%), Taxi 2801 and Taxi 81-11 (3% each) in terms of popularity of use (see Figure 23). Though we have no data on this, it can be assumed that taxi drivers work with only one radio operator because these companies tend to have exclusivity clauses in their contracts prohibiting drivers from working with other intermediaries and because radio operators usually charge a monthly fixed rate for their services (Kluge, Kocher, Müller, & Zenz, 2020), which means there is little financial incentive to work with more than one company.

Figure 23: Most used radio operator, users only (N = 109)



When asked about evaluations and pricing transparency, almost 40% of drivers using radio operators disagree with the notion that they can predict their earnings from a ride before accepting it (see Figure 24). However, 82% understand how their pay is calculated by these intermediaries. Less than 25% of the drivers feel pressured to receive positive customer reviews, but many drivers feel pressure to accept all ride requests from these platforms (43%) and that they cannot cancel a ride after accepting it (61%).

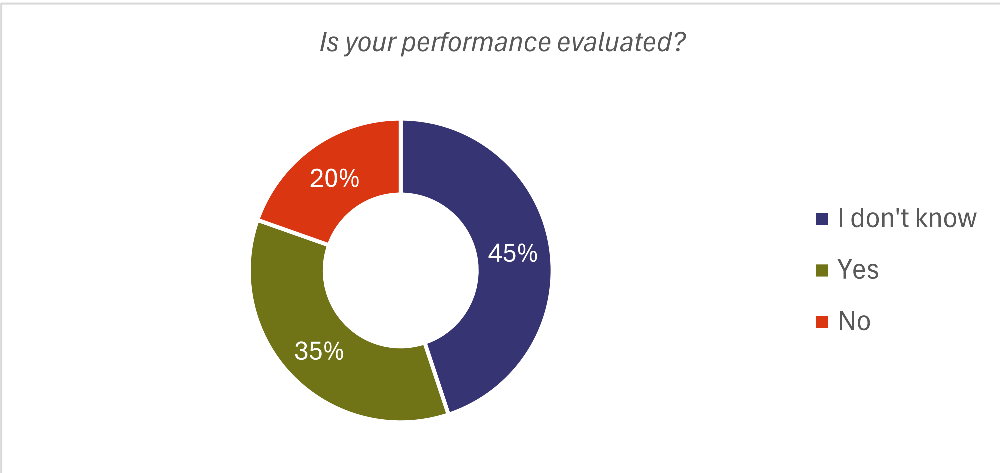
Figure 24: Statements about radio operators I, users only (N = 107)



Note: The percentages on the left represent respondents who "strongly agree" or "tend to agree," while those on the right represent respondents who "tend to disagree" or "strongly disagree." The middle percentage reflects those who answered "neither agree nor disagree."

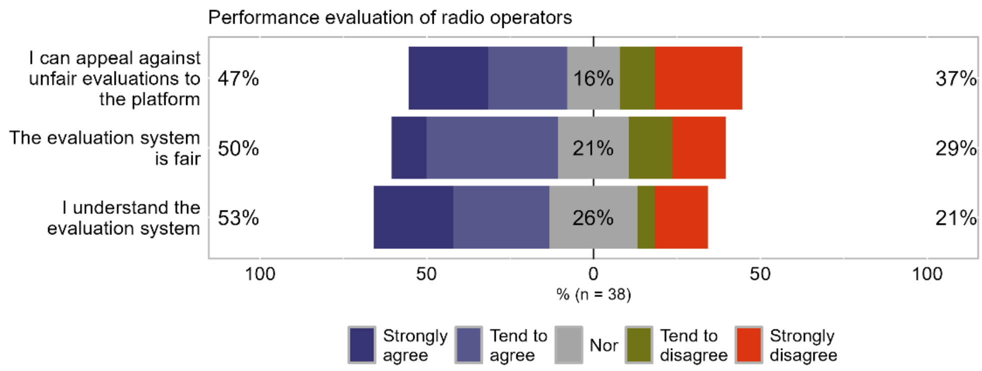
Turning to performance evaluations, we find that nearly half of the respondents do not know if their performance is evaluated by the radio operator they cooperated with the most (Figure 25). 35% responded with yes and the remaining 20% were sure that no performance assessment takes place.

Figure 25: Performance evaluations of radio operators (N = 107)



Among the small group of drivers (N=38) who said that they are subject to performance assessments by radio operators, the majority perceived the evaluation system as fair and comprehensible and 47% said they can appeal against unfair evaluations (Figure 26).

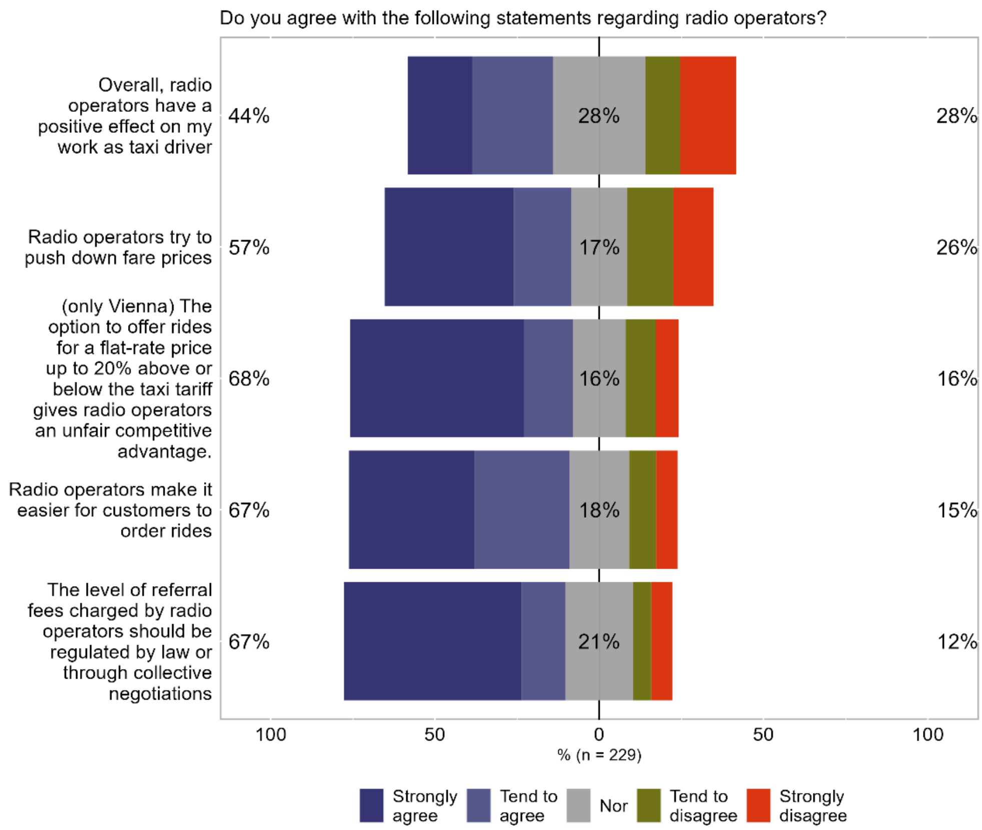
Figure 26: Evaluations systems of radio (N = 38)



Note: The percentages on the left represent respondents who "strongly agree" or "tend to agree," while those on the right represent respondents who "tend to disagree" or "strongly disagree." The middle percentage reflects those who answered "neither agree nor disagree."

Opinions about radio operators among all taxi drivers, whether they use them or not, (see Figure 27) show that 44% think that radio operators positively impact their work, with 67% acknowledging that these intermediaries make it easier for customers to order rides.

Figure 27: Statements about radio operators II (N = 229)



Note: The percentages on the left represent respondents who "strongly agree" or "tend to agree," while those on the right represent respondents who "tend to disagree" or "strongly disagree." The middle percentage reflects those who answered "neither agree nor disagree."

At the same time, 67% of taxi drivers believe referral fees charged by these radio operators should be regulated by law or through collective bargaining and more than half of respondents say that radio operators try to lower fare prices. This sentiment is stronger in Vienna, with 64% agreeing, compared to 33% in the rest of Austria. Lastly, 68% of drivers in Vienna agreed with the statement that the option to offer rides for a flat-rate price up to 20% above or below the taxi tariff gives radio operators an unfair competitive advantage.

Drivers who cooperate with radio operators view them more positively with 79% agreeing that radio operators make it easier for customers to order rides (+13 percentage points compared to the total sample), and 72% agreeing that the overall effect of radio operators on their work is positive. However, there are no large differences in the responses of those who work with radio operators and those who do not regarding the other three statements with 55% agreeing that radio operators try to push down fare prices, 67% agreeing that the Viennese price band gives radio operators an unfair advantage and 67% agreeing that referral fees should be regulated.

4.3.3 Comparison between online platforms and radio operators

The results above related to the attitudes towards two types of intermediaries show some similarities, but also differences in how radio operators and online platforms are viewed by taxi drivers. Wherever differences exist, online platforms are perceived more negatively by drivers. For example, Figure 19 (online platforms) and Figure 24 (radio operators) show that the majority of drivers cooperating with both types of intermediaries agreed that they understand how their pay is calculated, but the share was 22 percentage points higher for drivers cooperating with radio operators (82% agreed) than for users of online platforms (62% agreed). Similarly, 39% said they cannot estimate how much they will earn from an order referred to them by a radio operator, compared to 62% who said the same about orders from online platforms.

The comparison of figures 19 and 24 further shows that around 60% of drivers cooperating with either type of intermediary said they feel they cannot cancel orders once they were accepted. However, platform users feel more pressure to accept all drives offered to them (57% vs. 43%) and to receive good customer evaluations (62% vs. 24%). Comparing the results in figures 20-21 and 25-26 shows that more drivers using online platforms believe their performance is assessed (80% vs. 35%) and among those subject to performance evaluations platform users are less likely to perceive the evaluation system as fair (32% vs 50%) and a smaller share feels that they can appeal against unfair evaluations (20% vs. 47%).

With respect to general statements about the role and function of both intermediaries (Figure 19 and Figure 27), roughly two thirds of respondents agreed that platforms and radio operators make it easier for customers to order rides. Furthermore, majority of respondents agreed that both online platforms and radio operators try to push down fare prices (57% radio operators, 91% platforms), and that the option to offer rides for 20% above or below the regular fare in Vienna gives intermediaries an unfair competitive advantage (68% radio operators, 81% platforms), and that the level of the referral fees charged by these intermediaries should be regulated (67% radio operators, 81% platforms). However, especially with respect to the view that intermediaries push down fare prices, online platforms are viewed more negatively than radio operators. The perceived lack of transparency in pricing described above and platforms' efforts to supress prices may create compounded problems for drivers. As one driver added in the open-ended question section of the survey, not knowing the fare price puts him in jeopardy of fines for undercutting the taxi tariff because he as a driver, not the intermediary that set the fare price, will be held responsible:

> "They [*the online platforms*] are doing slavery. They do not show the price and when the Marktamt (*market authority*) checks, the penalty comes to me."

In sum, the results indicate that online platforms and radio operators are not perceived as fundamentally different actors by the drivers, but the former are generally seen as more prone to using unfair performance assessments, less transparent about fare prices and more likely to engage in anti-competitive pricing strategies. Against this background, it is not surprising that the overall impact of online platforms is also viewed as negative by a larger share of drivers (53%) than that of radio operators. In this respect, it is particularly noteworthy that while those drivers who work with radio operators perceive them more positively than those who do not, this is not the case for the users of online platforms who are as critical of the organisations' overall impact on their work as all other drivers. This suggests that at least some taxi drivers work with online platforms but do so only out of necessity. This interpretation is in line with the response to an open question by one respondent:

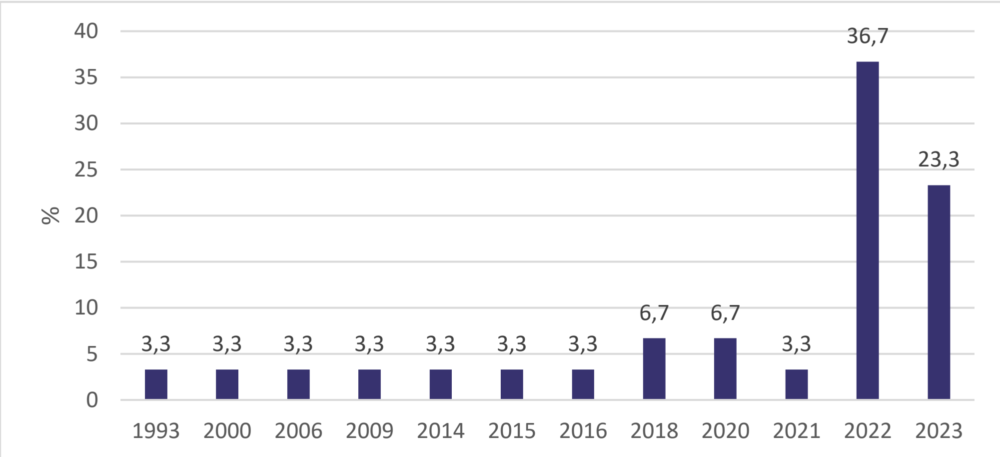
> "[*We use online platforms*] because we have to. It would be better if we did not have to. Radio operators are better for us. Uber and Bolt prices do not match the Vienna taxi tariff at all, and they are very low, almost half. Since cars without radio [*drivers who don't cooperate with a radio operator*] work with Uber and Bolt, [*we receive fewer customers*]. So, even those who have radios have to drive Uber and Bolt."

4.4 Collective action

This chapter presents the results concerning the dynamics of collective action among both employed and self-employed taxi drivers. In the survey, we explored various aspects of collective action among taxi drivers including their year of joining trade unions, reasons for joining, reasons for not being a member, the likelihood of joining trade unions in the future, and contacts among taxi drivers at work.

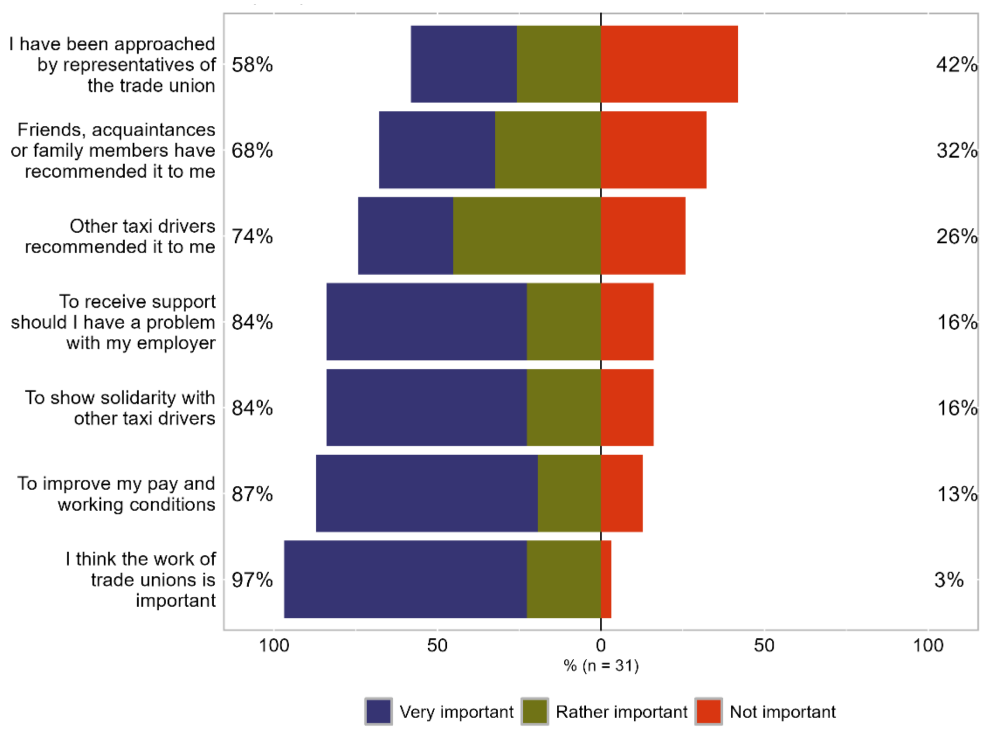
Among the taxi drivers surveyed, 14% said that they are trade union members, which as stated in section 3.4 represents a strong overrepresentation of union members for the industry at large. Among current trade union members, 60% joined within the past two years, in 2022 or 2023 (see Figure 28).

Figure 28: Year of joining a trade union, current members only (N = 30)



To understand why taxi drivers join unions, we asked current trade union members to rate the importance of seven possible reasons for their decision (Figure 29). Nearly all (97%) said that the belief in the importance of the work trade unions do was a very or rather important reason. The desire to improve pay and working conditions, show solidarity with other taxi drivers, and receiving support in case of problems with employers (Figure 29) were also viewed as further important reasons by more than 80% of respondents. Recommendations to join unions by others or recruitment efforts by union officials were viewed as less important. Interestingly, recommendations by other taxi drivers to join a union were considered more important than being approached by a representative of the union.

Figure 29: Statements about trade union membership, members only (N = 31)

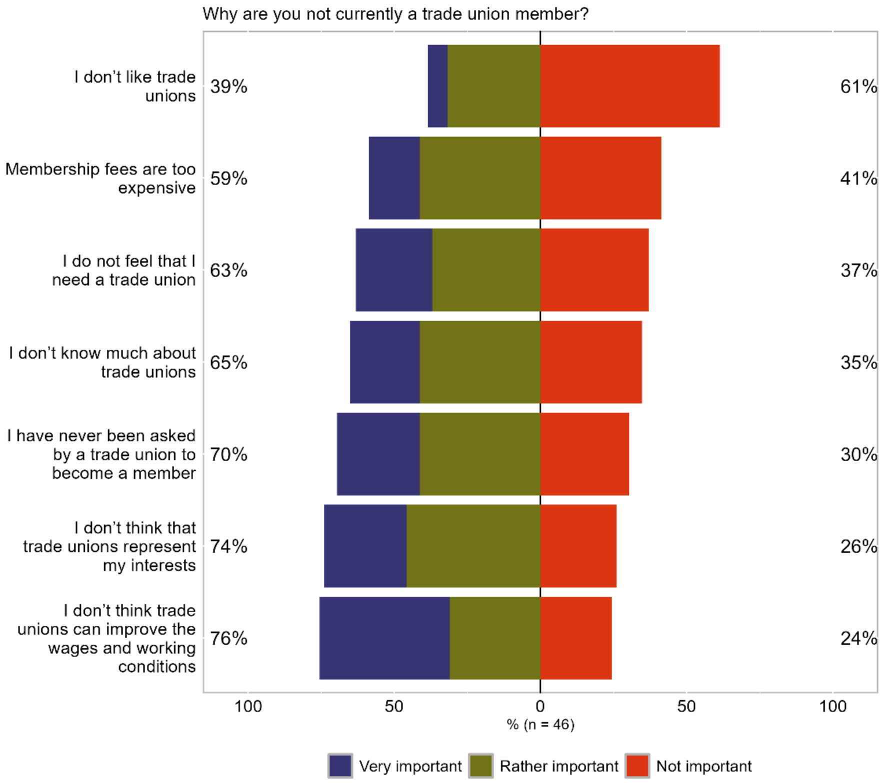


Note: The percentages on the left represent respondents who consider the statements "very important" or "rather important," while those on the right represent respondents who consider them "not important."

Employed taxi drivers who were not trade union members were also asked about their reason for not joining a trade union (see Figure 30).[15] The primary reasons reported for non-membership are the belief that trade unions cannot improve their wages and working conditions (76%), the perception that trade unions do not represent their interests (74%), and not being approached by a trade union (70%). The least common reasons for not joining include a general dislike of trade unions (39%) and the perception that membership fees are too high (59%).

[15] Self-employed can join the trade unions as well. To this end, the trade union vida started the initiative vida*flex* which is targeted specifically at solo self-employed and employers with up to four employees. Including in the taxi industry. However, trade union membership remains more common among employees which is why we only asked the latter why they have not joined a union.

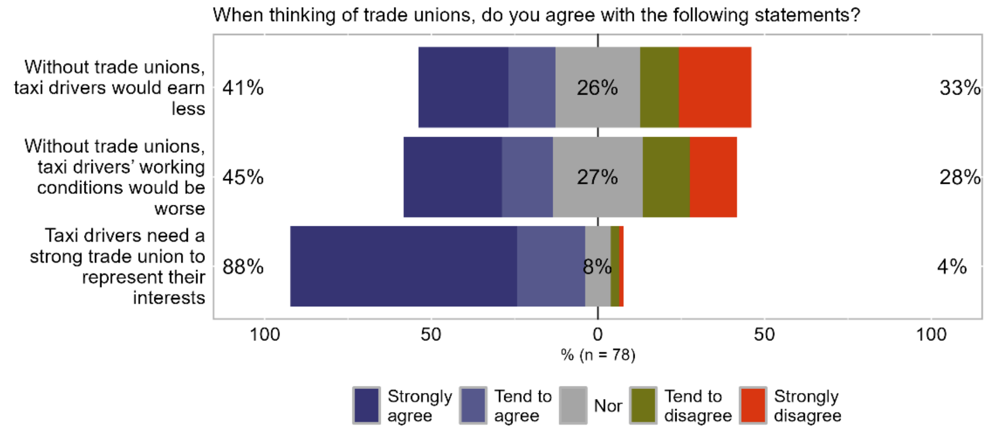
Figure 30: Statements about not being a trade union member, employees and non-members only (N = 46)



Note: The percentages on the left represent respondents who consider the statements "very important" or "rather important," while those on the right represent respondents who consider them "not important."

Similar results are also reflected in responses to general statements about trade unions. As shown in Figure 31, employed drivers – union members and non-members alike – were asked to evaluate three statements. Overall, a small plurality (41%) agreed that without trade unions taxi drivers would earn less and a slightly larger number (45%) agreed that without unions drivers' working conditions would be worse. Interestingly, a great majority of all employed drivers (88%) believes that trade unions are necessary to represent the interests of employed taxi drivers.

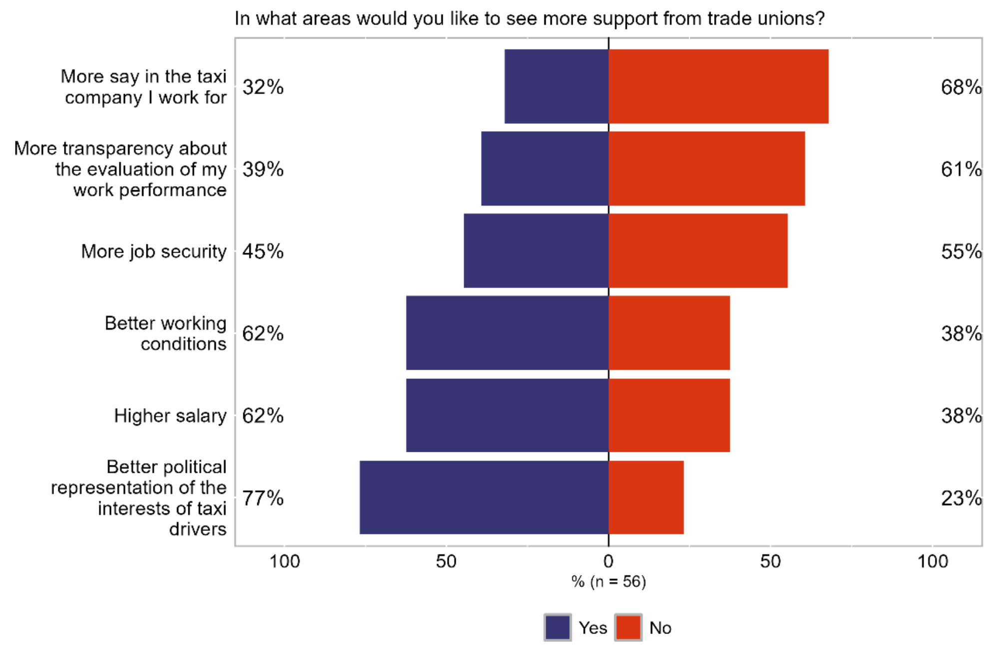
Figure 31: Statements about trade unions, employees only (N = 78)



Note: The percentages on the left represent respondents who "strongly agree" or "tend to agree," while those on the right represent respondents who "tend to disagree" or "strongly disagree." The middle percentage reflects those who answered "neither agree nor disagree."

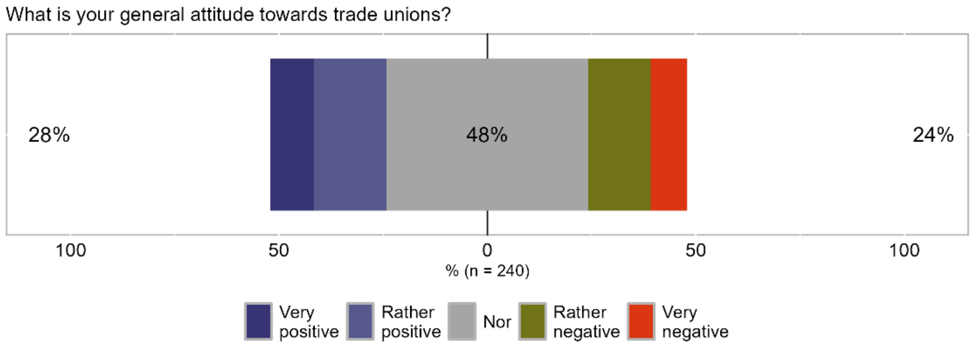
When asked about areas in which they would like to see more support from unions, the highest share of employed taxi drivers who are not trade union members mentioned better political representation for their interests, followed by higher salaries, and improved working conditions (Figure 32). Less commonly mentioned reasons were a desire for greater influence within their companies, increased transparency in performance evaluations, and enhanced job security.

Figure 32: Areas of support from trade unions, non-unionised employees only (N = 56)



Finally, all survey participants were asked to describe their overall attitude towards trade unions. The majority of taxi drivers have a neutral attitude towards the work of trade unions (around 50%). More taxi drivers have a rather positive attitude toward trade unions (28%) than rather negative (24%).

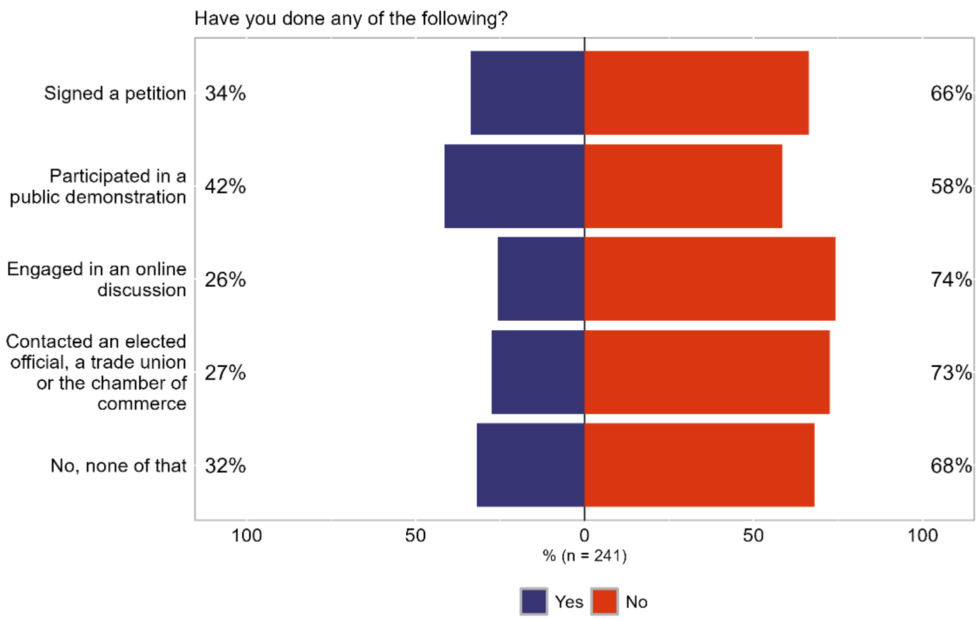
Figure 33: Attitude towards trade unions (N = 240)



Note: The percentages on the left represent respondents who "strongly agree" or "tend to agree," while those on the right represent respondents who "tend to disagree" or "strongly disagree." The middle percentage reflects those who answered "neither agree nor disagree."

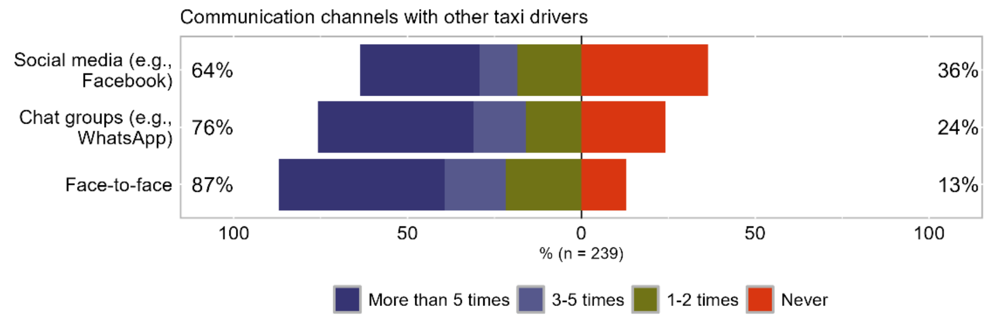
In addition to trade union membership, we inquired about other forms of political and collective action. As shown in Figure 34, 34% of taxi drivers have signed a petition, while 66% have not. Participation in public demonstrations is relatively higher, with 42% having attended, compared to 58% who have not. Online discussions are less common, with only 26% of drivers engaging in them, whereas 74% have not. A quarter of respondents said they had contacted an elected official, a trade union, or the chamber of commerce. 32% of the drivers have not participated in any of these activities.

Figure 34: Participation activities



Lastly, we asked about contacts between drivers which showed that nearly all (87%) drivers report having face-to-face interactions with other drivers at least once a week, while 76% maintain weekly contact through chat groups. Additionally, 64% use social media platforms to communicate with fellow drivers at least once or twice a week.

Figure 35: Communication channels for an average work week (N = 239)



Note: The percentages on the left represent respondents who on average talk with other drivers more than once on average per week through the respective channels, while those on the right represent respondents who "never" do so.

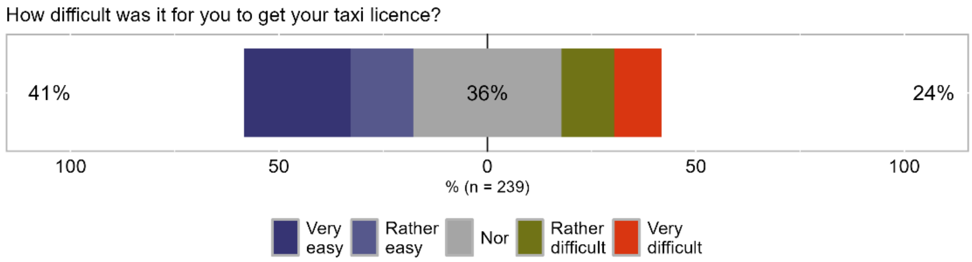
This section started by mentioning the very low unionization rate in the Austrian taxi and the results presented in the following provide several indications as to why this is the case. On the one hand, our findings show that Austrian taxi drivers are by and large a politically engaged group who frequently interact with one another and who tend to have neutral to positive views of trade unions – characteristics that could provide fertile ground for unionization. Moreover, nearly all employed drivers (88%) agree with the need for a strong trade union to represent their interests and, as reported in section 4.2, virtually all drivers know about the collective agreement for employed taxi drivers. In other words, there is a clear desire for a group representing workers' interests and workers are universally aware of what usually is a major achievement for a union, the collective agreement.

On the other hand, however, the results show that many drivers view trade unions in Austria as unwilling or unable to change their situation for the better. In other words, the results indicate low levels of perceived 'union efficacy' which is often linked to low levels of trade union membership (Givan & Hipp, 2012). In this respect it is also notable that the principal area in which employed taxi drivers would like to see more support from unions is not one related to traditional struggles between employers and employees – even though higher salaries and better working conditions rank second – but rather a better political representation of the interests of taxi drivers. This suggests that even taxi drivers in a regular employment relationship view political decision-making as the strongest factor influencing their working lives. Against this background, the next section will explore precisely what challenges drivers feel confronted with.

4.5 Challenges at work

To understand which issues drivers view as their biggest challenges at work, we asked them to describe their experiences with the following aspects of their working life: with obtaining a taxi licence, to rank the relevance of specific challenges and to share their opinion on the reform of the Occasional Transport Law (*GelverK*). Regarding the first question, 41% of respondents found it easy or very easy to obtain their taxi driver's license, whereas 24% described this experience as (rather) difficult (Figure 36).

Figure 36: Taxi Licence

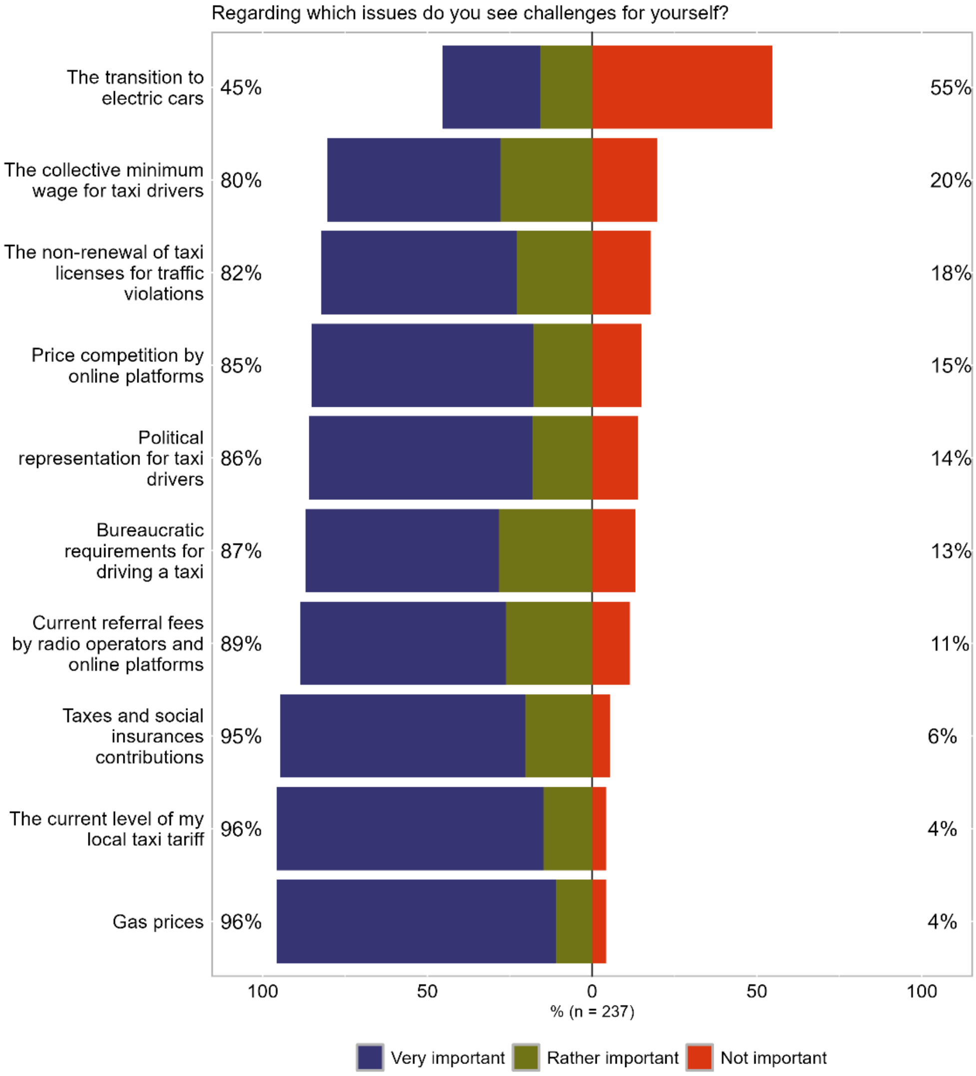


Note: The percentages on the left represent respondents who think it was "very easy" or "rather easy" to get their licence, while those on the right represent respondents for whom it was "rather difficult" or "very difficult." The middle percentage reflects those from whom it was "neither easy nor difficult".

Regarding challenges at work, respondents were asked to assess 10 challenges as "not", "rather" or "very" important. As shown in Figure 37, most respondents described nearly all challenges as either or rather important. Gas prices, the level of the local taxi tariff and taxes and social insurance contributions are the top concerns when the whole sample is considered. Several other challenges – the level of referral fees charged by intermediaries, bureaucracy, the political representation of taxi drivers, price competition by platforms, the non-renewal of taxi licences in case of traffic violations and the minimum wage for drivers – were described as very or rather important by 80% to 89% of respondents. Only the transition to electric cars was viewed as no challenge by most respondents. This is interesting considering that the city of Vienna in December 2023 decided that from January 2025, only electric cars will be permitted to enter service as new taxis (cars with combustion engines registered as taxis before this date will be allowed to continue to operate).[16] However, it is also possible that respondents, even in Vienna, did not perceive this change in rules as challenge because they were not aware of it.

[16] Änderungen der Wiener Landesbetriebsordnung für das Personenbeförderungsgewerbe mit PKW. LGB. Nr. 49/2023. Available at: https://www.ris.bka.gv.at/Dokumente/LgblAuth/LGBLA_WI_20231221_49/LGBLA_WI_20231221_49.html

Figure 37: Challenges at work



Note: The percentages on the left represent respondents who consider the statements "very important" or "rather important," while those on the right represent respondents who consider them "not important."

The importance of challenges varies slightly by the location and employment status. Drivers in Vienna view challenges related to intermediaries as more important than respondents from other parts of the country, specifically the level of referral fees (95% in Vienna, 69% in remaining Austria) and price competition by online platforms (90% Vienna, 71% in the rest of Austria). This means that in Vienna, the level of referral fees is a primary concern. Similarly, political representation is viewed by a higher share of Viennese drivers as a very or rather important challenge (89%), than among drivers operating outside the capital (76%). Regarding employment status, we find that 87% of employees view the minimum wage for drivers as a more very or rather important challenge compared to 78% of self-employed. Regarding all other challenges, we find very little differences between the groups.

When asked about challenges other than the ten suggested by us, several drivers (13) complained about a high number of 'illegal' drivers driving without a taxi license and asked for more effective control measures. Some linked the perceived rise in the number of illegal drivers to Uber and Bolt, whereas others complained about taxis from other regions illegally providing transportation services in the Viennese market. Nine respondents complained about a lack of political representation, including by the Chamber of Commerce which was described as non-responsive to drivers' concerns by some. Eight respondents expressed their frustration with Uber and Bolt, in their view, offering rides below the 20% deviation permitted under the Viennese taxi tariff. One driver also complained about being liable for fines if he drives Uber or Bolt customers for a price below the tariff, even though he will not see the destination and fare before accepting the order. In his words:

> *"Uber and Bolt continue to send work without showing the price and the destination address. Nobody checks the orders placed outside of the bounds of the tariff, and when they check, we pay a penalty as the boss because of the work that we have received without even seeing the price and the address which is outside the tariff bound (-20)".*

Other topics raised were the perceived need to limit the number of taxis (7), problems finding (reliable) drivers (6), opposition to the Viennese 'price band' which allows fixed fares 20% above or below the regular tariff (6), general traffic policies, including sufficient places where drivers can legally park to pick up and drop off passengers (5). Relatedly, fines were considered unfair and unavoidable because there are no legally permitted places to let out passengers. Specifically mentioned were the lack of parking options in the Viennese tourist hotspots *Schönbrunn* and *Museumsquartier*.

When asked about the reform of the Occasional Transport Act which was implemented between 2019 and 2021, 76% responded that they were aware of it. Out of those who knew about the reform, 43% said their personal situation had improved a little to a lot since the reform. 34% saw no change and 23% said their situation had worsened a little to a lot. Drivers who had worked as Uber or Bolt drivers before the reform and were required to obtain a taxi driver license to continue working as drivers were evenly split regarding its impact with one-third of respondents stating that their situation had improved, one-third stating that it had worsened, and one-third reporting no change.

5 Literature review and comparative analysis

After discussing the survey results, we now turn to the comparative analysis of recent empirical studies on platform work in different economic sectors in Austria, focusing on the following four areas:

- **Workforce composition** which considers the age and gender distribution, citizenship and employment status of platform workers.
- **Income and working conditions** which considers factors such as satisfaction with pay and working conditions, perceived autonomy at work and workplace risks.
- **Income dependency** which considers whether platform work is workers' primary occupation and main or only source of income or a side job providing complementary income.
- **Collective action** explores the existence of activists and or grassroots initiatives, the degree of unionisation in the industry as well as platform workers' attitudes towards trade unions.

For the literature review, German- and English-language studies from the past five years were considered. As a starting point, publications from research projects supported by the Vienna Chamber of Labour's Digitalization Fund Work 4.0, along with other scientific works presented at the "Day of Platform Work"[17] in September 2023, were reviewed. Additionally, a keyword search was conducted on Google Scholar using the terms "Click work Austria," "Cloud work Austria," "Digital labour platforms Austria," "Gig economy Austria," "Platform work Austria," "On-demand work Austria," and "Sharing economy Austria." The references of the identified studies were examined for further relevant publications (backward citation chaining).

Through these steps, 12 publications on the topic of platform work in Austria were identified, including reports, working papers, and articles from peer-reviewed journals. Of these, seven were selected that contain empirical data relevant to the four thematic areas mentioned above. [18] The selected works provide an overview of

[17] https://wien.arbeiterkammer.at/interessenvertretung/arbeitdigital/events/Tag-der-Plattformarbeit---Rueckblick.html

[18] Studies focused on Austria that did not include fieldwork were excluded from our analysis. This includes the legal analyses by Loschnigg (2019) and Brameshuber (2019), as well as the comparative policy analysis by Pernicka and Johnston (2021). Additionally, we excluded some studies from the Platform Day of Work event due to their focus on non-platform sectors or a focus on non-Austrian context. For example, Klaus, Haas, and Lamura (2023) was excluded because, although it partially included results from Austrian click-workers, its sample primarily consisted of workers based in Germany. Finally, the Fairwork Report for Austria (Griesser, et al., 2022) was not included

the current state of research on platform work in Austria in the economic sectors of click-work, food delivery, domestic work (cleaning and care), and passenger transport.

5.1 Overview and sector-specific scholarship

Platform work in Austria takes the form of both on-location and online (click-work) platform work. On-location platform work in Austria spans various sectors, including food delivery, grocery delivery, ride-hailing, and domestic work (Griesser, Gruber-Risak, Herr, Plank, & Vogel, 2023). However, it is difficult to get a comprehensive and precise picture of the scope and makeup of Austrian platform work.

Arguably the best and most recent data is provided by the 2021 Internet and Platform Work Survey conducted by the European Trade Union Institute (ETUI). The survey found that 3.1 percent of working-age Austrians perform platform work at least monthly, with 1.1 percent engaging weekly. 3.1 percent of working age adults engage in remote platform work (click-work), 1.4 percent are involved in transport and delivery services, and 1 percent work in other on-location platform jobs, such as domestic work. According to the survey, 35 percent of Austrian platform workers were foreign-born (Piasna, Zwysen, & Drahokoupil, 2022). Other demographic findings about the platform workforce suggest women are overrepresented in domestic work platforms, while men dominate delivery and ride-hailing roles (Griesser, Gruber-Risak, Herr, Plank, & Vogel, 2023; Wiesböck, Radlherr, & Vo, 2023; Vogel & Köszegi, 2023).

In the following section, we will discuss research results along the four outlined dimensions by each platform sector before comparing the findings at the end of the chapter.

5.1.1 Food Delivery

In the Austrian platform food delivery sector, the major players are Foodora, Lieferando, and Wolt. As of 2023, Foodora and Lieferando employed approximately 1,000 and 2,500 food delivery riders, respectively. Data on Wolt's workforce size remains unavailable (Kainrath, 2023; Lieferando, 2023). Lieferando hires all its

because its results are covered by the same authors in the more extensive study "*Faire Arbeit in der österreichischen Plattformarbeit?*" (Griesser, Gruber-Risak, Herr, Plank, & Vogel, 2023). Saupe and Schörpf (2021) also surveyed platform workers in Vienna about their experiences in a cross-city online survey, however, due to small samples they do not present their results separately for all cities surveyed, which makes the study unsuitable for our purposes.

couriers as regular employees, unlike Foodora, where 90 percent are freelancers and only 10 percent are full employees. Additionally, Foodora works with third-party logistics partners—subcontracted firms that handle deliveries on its behalf in certain areas. (Kainrath, 2023; Griesser, Gruber-Risak, Herr, Plank, & Vogel, 2023). Wolt exclusively offers freelance contracts. Smaller platforms like Alfies, Velofood, and Ninja.Jetzt also operate in this sector.

Within the literature examined, the food delivery sector has the most empirical studies compared to the other sectors. Our search resulted in four studies, two of which were based on quantitative and two on qualitative surveys.

Workers' representation in the gig economy: experiences of food delivery riders in Austria (Geyer & Prinz, 2022)

The authors analysed data from 303 survey responses collected from Austrian riders between 2021 and 2022. The study examined workers' motivation, assessment of working conditions (including safety, algorithmic management, and pay), and their attitudes towards collective action. The research was funded by the Chamber of Labour's Digitization Fund 4.0.

The findings of the study show a mixed picture regarding **income and working conditions**. Most surveyed platform riders (74 percent) reported enjoying their work, with noted positives being enjoyment of cycling, flexibility, and ease of access to starting the job. However, despite enjoying their work, less than half of workers were satisfied with working conditions or pay. The study also found that more than 80 percent of riders report having encountered dangerous traffic situations, and a significant share of riders reported various forms of workplace harassment and female workers are disproportionately affected by harassment and unwanted sexual advances. In terms of algorithmic management, more than half of the platform riders surveyed were aware that their performance was being assessed algorithmically of which 29.5% believed the evaluations to be unfair. In addition, slightly more than half of respondents felt monitored at work.

Notably, freelancers had slightly higher satisfaction with their working conditions and autonomy. However, the authors of the study suspect that platform companies likely offer freelancers better conditions to compensate for the lack of holiday and sick pay entitlements. In conclusion, while platform riders generally enjoy their jobs due to factors like flexibility and cycling, significant concerns remain regarding working conditions, pay, safety.

The average weekly working hours, which offer insight into how **dependent the workers are on platform income**, there is significant variation among platform riders in Geyer and Prinz's study. 36.3 percent of the sampled respondents worked under 15 hours, over 60 percent worked over 20 hours, and only 7.2 percent worked more than 40 hours (full-time equivalent) per week. Furthermore, Geyer and Prinz found that 80 percent of the respondents rely on platform income to pay household bills and a quarter use this income to support family members. Finally, around half of respondents among the sampled food delivery riders did not think they could easily get another job. Third-country migrant respondents were found to work longer hours and more frequently support family members with their income.

These results indicate that approximately one third of the riders surveyed do this work as a secondary activity and are only dependent to a small extent on their income from this activity. At the same time, a not insignificant proportion of riders, particularly third-country nationals, are highly dependent on their job as a rider due to family obligations and a lack of alternative income opportunities.

Regarding **collective action**, it should be noted that there has been a collective agreement for bicycle couriers in Austria since 2020 and that a works council has been established at both Foodora (Mjam) and Lieferando. In addition, since 2021 there has been a loosely organized group of activists, the Riders Collective, who are committed to the interests of riders with the support of the unions and the Chamber of Labour. Against this background, the survey by Geyer and Prinz found that employees of the delivery platforms are generally positive about unions and in most cases were open to joining. Most respondents also considered trade unions and works councils necessary to represent their interests and improve working conditions and income. Most respondents cited a lack of knowledge about unions and the fact that they have not yet been asked to join a union as obstacles to joining. Some freelancers also felt that their interests were not represented by the unions.

The sample collected by Geyer and Prinz was not randomly selected and therefore cannot be considered fully representative. The authors point out that, due to the distribution strategy chosen, riders for Mjam (Foodora) are underrepresented over and for Lieferando. Union members and people with university degrees are also overrepresented. Nevertheless, some conclusions can be drawn from the data regarding the **workforce composition** of platform workers in food delivery services. In their sample, the average age of riders is 30.2 years, with 11 percent aged 40 or older and a small number over 50. Geyer and Prinz found that 84.5 percent of the workforce is male. Citizenship among the surveyed platform riders was diverse with around a third being Austrians, another third from other mostly neighbouring EU countries, and the remaining third from non-EU countries (primarily Syria, Afghanistan, Turkey, and Yemen).Only a third of the riders are students, and the majority were not in any form of training, contradicting the assumption that this sector is predominantly made up of students.

<u>Riding Together? Why app-mediated food delivery couriers join trade unions in Austria </u>(Geyer, Vandaele, & Prinz, 2023)

Using the same survey data as in the previous study (Geyer & Prinz, 2022), the authors use regression analyses to explore in depth **why food delivery riders join trade unions**. The study finds that riders are not dissimilar to workers in traditional industries in terms of the determinants of union membership and decide for or against joining based on a combination of instrumental and value-rational reasons (Geyer, Vandaele, & Prinz, 2023, p. 16). Instrumental reasons in the sense of Max Weber describe the goal of improving one's personal situation, e.g. one's own income or working conditions, by joining a union, whereas value-rational action describes action based on beliefs, e.g. the belief that unions do important work that should be supported by one's membership.

The authors also conclude that central features of the platform economy make it difficult for unions to organize riders. Particularly worth mentioning are the employment of riders as freelancers, the often-short duration of employment in the industry and the lack of personal contact between riders. The employment of riders as freelancers creates a dilemma for unions, as works councils are not allowed to represent the interests of freelancers and collective agreements do not apply to them, meaning that unions are only able to improve the working and income conditions of this group to a limited extent. On the other hand, the study results show that participation in Riders Collective events greatly increases the likelihood of joining a union, even among freelancers. This result suggests that unions can significantly support the union organisation of platform workers by supporting activists.

<u>Just a small cog in the machine? The working conditions of bike couriers in Salzburg</u>[19] (Aschauer, Obenholzer, Steibler, & Stadler, 2023)

The authors conducted a qualitative analysis of the demographics, working conditions, motivations, and attitudes of food delivery couriers in Salzburg on behalf of the Salzburg Chamber of Labour which utilized data collected from two group discussions and 26 intensive interviews conducted between 2022 and 2023.

The results of Aschauer et al. regarding the **working conditions** of food delivery riders largely reflect the survey results of Geyer and Prinz (2022) discussed above. For example, riders in Salzburg highlight the opportunity to exercise, the independence associated with the job in terms of working hours and freedom, especially the absence of a direct supervisor, as positive aspects of their work. Time pressure and dangers in road traffic, which are exacerbated by bad weather in the winter months, are perceived as problematic. Absences due to accidents and illness are problematic due to the associated loss of income, especially for freelancers. Absence from work can also lead to a downgrade in the internal ranking and thus to fewer orders at one of the analyzed platform companies for freelancers, which is why the authors assume that some of the freelancers affected continue to work even when they are ill to avoid a downgrade. Female riders also report sexual harassment in the form of sexist comments and unwanted contact via social media by passers-by, other couriers,

[19] The original German title is „Nur ein kleines Rad im Getriebe? Die Arbeitsbedingungen von Fahrradkurrier:innen in Salzburg“

customers, restaurant owners and employees. Most riders, on the other hand, found the GPS tracking used by platforms to locate riders and assign orders to be less of a problem. Although most riders were aware that their movements were being tracked by GPS technology, the majority saw and accepted the use of this technology as a normal work tool.

Regarding **collective action** and **union organization**, Aschauer et al. found only limited motivation among the riders interviewed to work together to solve existing problems and an indifference towards union initiatives. Many couriers deal with problems alone or discuss them in chat groups with colleagues. The study authors estimate the visibility of the Chamber of Labour, works councils or trade unions among riders in Salzburg to be low.

Finally, in terms of **workforce composition**, the study seems to parallel the demographics shown in the Geyer and Prinz study. The authors highlight that most bicycle couriers in the study are students and individuals with migrant background, with a notable underrepresentation of female couriers. For migrant workers, the fact that the job is easy to get is an important factor. Furthermore, migrants often compare their income as rider to wages in their home country which are often considerably lower and as a result, they tend to view these opportunities more favourably than Austrians.

<u>Fair Work in the Austrian Platform Economy? </u>(Griesser, Gruber-Risak, Herr, Plank, & Vogel, 2023)

This 2023 study provides perhaps the most detailed and cross-industry qualitative study of working conditions in the Austrian platform sector by industry. The study involved 37 interviews completed in 2021 with platform workers at six firms including 12 workers in food delivery (Foodora and Lieferando) and 6 workers in grocery delivery (Alfies).

Regarding their **working conditions**, the surveyed food delivery riders expressed dissatisfaction with negative customer contacts, problems with equipment, concerns about road hazards and inadequate health and safety measures in connection with the COVID-19 pandemic. Negative interactions with customers were mainly reported by women and riders with a migrant background, with some also stating in interviews that they avoid night shifts to prevent potential violence from customers.

Freelancers who are paid for deliveries rather than for working hours like regular employees do unpaid work while waiting for orders, as well as waiting at restaurants and customers. Some freelancers would like to switch to regular employment, but report that their application was rejected. Others, on the other hand, expressed positive views about the flexibility offered to them and, in line with the findings of Geyer and Prinz (2022), do not aspire to switch to a "normal" employment relationship. The collection of GPS data and the associated ability of the platform company to determine where riders are at any time during working hours was viewed critically by some riders, while others saw the use of this technology as unproblematic, which is consistent with the results of Aschauer et al. (2023) and supports the assumption that many riders are aware that their movements are being tracked, but are not too concerned about it.

Attitudes and engagement with **collective action** among riders at Alfies, Lieferando, and Foodora vary significantly. At Alfies, the authors report that couriers generally feel isolated with minimal awareness of or participation in collective efforts, reflected in their limited interactions and lack of formal representation. In contrast, Lieferando couriers exhibit a mixed but more engaged stance, with a functioning works council that some riders appreciate and interact with. While some riders engaged in organizing expressed appreciation for the role of trade unions, most expressed little familiarity with the role of unions, the chamber of labour or the grassroots workers centre known as the Riders Collective. Foodora also has a works council, but legally it can only represent the interests of employed delivery riders, who only make up about 10% of Foodora couriers. The Foodora riders interviewed for the study see the Chamber of Labour and the Riders Collective as organizations that offer support, but trade unions less so. However, some riders still regard the collective agreement for bicycle couriers as a union success. Most riders also do not expect that union membership would lead to negative consequences for them from the company. Thus, the study in some ways echoes the mixed picture of some engagement but with still significant non-engagement and lack of awareness described in previous studies.

Regarding the **composition of the workforce** in food delivery, the sample from Griesser et al. is too small to draw conclusions about the entire population. However, like the other studies on food delivery platforms, their analysis clearly indicates that that most riders are men.

5.1.2 Domestic Work

In the domestic work sector, there are several platform companies active in Austria that offer a wide variety of services. Several platforms have been studied or discussed in the media, including cleaning services like ExtraSauber, Helpling.at, and Haushaltshilfe24, the care-services platform Betreut.at, and the home improvement services platform MyHammer (Kapeller, 2023; Wiesböck, Radlherr, & Vo, 2023; Vogel & Köszegi, 2023; Griesser, Gruber-Risak, Herr, Plank, & Vogel, 2023). The platforms vary in size, from 60,000 domestic workers registered with Haushaltshilfe24 to just under 6,000 Handymen registered at MyHammer (Greß, 2023; MyHammer, n.d.). Platform workers in this area are either self-employed or work for companies that offer services through these platforms (Vogel & Köszegi, 2023; Wie funktioniert MyHammer?, n.d.; Greß, 2023).

Three separate studies published in 2023 examine the domestic platform work, which includes services such as cleaning and childcare.

Domestic Cleaners in the Informal Labour Market: New Working Realities Shaped by the Gig Economy? (Wiesböck, Radlherr, & Vo, 2023)

For this study, also financed by the Chamber of Labour Vienna, the authors interviewed 15 female platform cleaning workers in Vienna to evaluate their work experiences. Interviewees were purposively recruited to represent a diverse sample in terms of age, citizenship, they type of platform they work for and employment status (informal work, formal employment, self-employment).

The interviewees described several issues regarding their **income and working conditions**, including downward pressure on wages due to many workers offering low rates and, echoing complaints in the delivery sector, around unpaid waiting time and the need to invest significant unpaid private time in acquiring clients. They also mentioned the inability to take sick leave and the pressure to maintain positive ratings to retain access to the platform. Workers pointed out that sexual harassment was a significant problem, mirroring the gendered harassment reported by food delivery riders. Interviewees described harassment both in direct messages on the platform and in person with customers commenting on their appearances and suggesting higher pay for sexual services. According to the authors, this type of behaviour was encouraged by the way the platform works, as service providers feel the need to draw attention to their profiles through photos and there is only a one-sided rating mechanism that allows customers to rate service providers, but not the other way around.

The authors note that the often-undeclared status of work within the domestic sector further accentuated the interviewed workers' vulnerability. This status also increased their exposure to objectification and harassment by clients. Despite the reported poor working conditions, Wiesböck, Radlherr, and Vo noted that it has been challenging for unions to organize cleaning workers. This is mainly due to the workforce composition as a "spatially and linguistically fragmented group" (2023, p. 265).

Fair Work in Platform-Mediated Care Work in Austria? (Vogel & Köszegi, 2023)[20]

Vogel and Köszegi investigated platform-mediated home care work and found similar findings regarding informality, precariousness and gender-specific risks as the previous study. The study uses the platform Betreut.at (the Austrian branch of Care.com) as a case study of a so-called 'lean' platform, which is set up as a marketplace to connect potential clients and care workers. The service is financed through membership fees charged to clients. Based on interviews with ten workers,

[20] Faire Arbeit bei plattformvermittelter Sorgearbeit in Österreich?

who use this platform, insights on the working conditions of platform-mediated care workers are given.

The primary issues reported, echoed the findings of Wiesböck, Radlherr, and Vo (2023) regarding **working conditions**, including low hourly rates, unpaid work related to client acquisition, unpredictable work schedules, and safety concerns such as violence and sexual harassment from clients. In terms of **income dependency**, most care workers in the sample used the income generated through the platform as supplementary, with only a few relying on it as their main source of income.

There is little evidence of **collective action**. The interviewed workers had little knowledge of or engagement with the various institutions of collective representation, such as interest groups, works councils, or trade unions, and had minimal contact with them. However, one worker shared a story of successfully contesting an unfair dismissal with the help of the Chamber of Labour.

Fair Work in the Austrian Platform Economy? (Griesser, Gruber-Risak, Herr, Plank, & Vogel, 2023)

The multi-sector study by Griesser, Risak, Herr, Plank and Vogel (2023) included a case study of the cleaning firm ExtraSauber based on interviews with seven workers. Service providers on the platform are either self-employed or work for cleaning companies. The platform itself does not employ and cleaners directly.

Regarding **working conditions**, interviewed cleaners cited concerns around conflicts with customers and in at least one other case a worker reported being physically attacked by a customer. One interviewee noted concerns about the lack of preventive measures for accidents however most workers reported not having any experience with accidents. Consistent with the platform delivery literature reviewed above, workers did not appear concerned about the firm's handling of their data or the sharing of their private numbers with clients. Both self-employed and full-employed workers reported feeling that their contracts were adequate.

In terms of **income dependency** workers reported working 20-30 hours per week on their work for ExtraSauber, although they also noted that the number of working hours fluctuates. This number of hours would seem to indicate a high degree of dependency on their income from platform work. Similar to the Vogel and Köszegi study (2023), interviewed workers were not familiar with the institutions of collective representation in their sector work.

5.1.3 Taxi and Ride-Hailing

As described in Chapter 2, Bolt and Uber are the main ride-hailing platforms operating in Austria. Both companies do not employ drivers themselves but work exclusively with subcontractors called "fleet partners" - either independent taxi operators who carry out the trips themselves or taxi companies whose employed drivers carry out the trips. As already mentioned, both self-employed drivers and drivers employed by taxi companies require a taxi driver's license ("taxi license") (Griesser, Gruber-Risak, Herr, Plank, & Vogel, 2023). As mentioned in Chapter 2, no data is known on the number of drivers working with Uber or Bolt. However, a survey of the Viennese population in 2020 found that they use Uber and similar platforms about as often as regular taxis (Saupe & Schörpf, 2021).

Fair Work in the Austrian Platform Economy? (Griesser, Gruber-Risak, Herr, Plank, & Vogel, 2023)

In addition to the survey described in the previous chapters, the only relevant study in recent years that has dealt with the online ride-hailing industry in Austria is the comparative study by Griesser et al., which draws on 12 interviews with drivers from Bolt and Uber.[21]

The study's results are very much in line with our survey's findings. Regarding **working conditions**, the authors find several issues including the 18% service or referral charge that reduce drivers' incomes, aggressive passengers, difficulties with the driver rating system, and penalties for cancelling orders. Employed drivers, according to this study, worked 11 hours a day, five days a week, while self-employed drivers often worked more than six or seven days a week, often more than 60 hours a week. The long working hours indicate a high degree of **dependency**. However, it is unclear whether the drivers surveyed drive customers exclusively referred through online platforms also provide traditional taxi rides, i.e. whether they are only dependent on their job as taxi drivers or also on platforms. Griesser et al. also found that Uber and Bolt drivers were involved in grassroots protests, demonstrations, and car convoys, but despite this active participation in sporadic **collective actions**, these drivers had little contact or engagement with traditional unions.

5.1.4 Click-Work Sector

Click-work is location-independent platform work that is performed online and covers a wide range of tasks for clients around the world. Platforms such as Fiverr, Clickworker and Upwork offer a range of tasks for different skill levels. According to data from the 2023 Online Work Index, 36% of people working in Austria via click-work platforms work in software development and technology (Stephany, Kässi, Rani, & Lehdonvirta, 2021). Overall, self-employment seems to be the dominant

[21] The survey by Saupe and Schörpf (2021) also covers drivers for Uber and similar platforms in Vienna. Due to small sample sizes, however, the authors only present the results on drivers' income and working conditions for eight European cities together and not separately for Vienna. In addition, the survey data was conducted in 2020, i.e. before the introduction of the taxi license requirement for Uber and Bolt drivers, which severely limits comparability with the current situation.

employment model (Lutz, 2017; De Groen, Kilhoffer, Lenaerts, & Mandl, 2018; Maric & Schüßler, 2024).

Click-work, in comparison to on-location platform work, is relatively understudied. In our review, we identified only one relevant study from Austria.

<u>Digitalization and work organization: narratives, practice and design options</u> (Maric & Schüßler, 2024)

The authors assess how narratives of flexibility compare to conditions of platform work in Austria through 25 interviews with Austria-based click workers as well as interviews with trade union and employer representatives. The click workers interviewed were mostly high-skilled and worked on large platforms like Fiverr or smaller niche platforms for specialized services such as tutoring or psychotherapy.

In terms of **working conditions**, the study finds that click workers see similar benefits in their work as platform workers in other sectors, namely flexibility, autonomy and accessibility of work. However, the study also highlights significant issues associated with click-work. Similar to other platform sectors, click-workers bear all the risks of business operations as solo entrepreneurs. Additionally, a challenge more specific to click-work is the downward pressure on wages caused by intense global competition, including competition with workers from low-wage countries.

Regarding the **dependency** of click-workers on their income, one interviewed worker mentioned that 90 percent of their earnings come from click-work, expressing significant concern about the potential for arbitrary account cancellations. On the topic of collective action, the interviewed click-workers reported feeling powerless and having little contact with other workers. Researchers noted that the intense competition for click-work undermines collective action, as workers are more focused on securing jobs than on organizing. As one interviewed click-worker put it, "*Actually, I'm not interested because everything happens so quickly. If someone places an ad, a lot of people respond very quickly and if you want to chat with someone, it's a waste of time. I think there are other platforms for chatting like* (laughs)" (Maric & Schüßler, 2024, p. 91)[translated].

Although the data in the study are limited and come from a small pool of highly skilled click workers, they provide some insight into the dynamics of working conditions, income dependency and collective action in this sector. At the same time, the lack of empirical studies on click workers in Austria highlights the need for further research.

5.2 Comparison

Workforce composition

Platform work in Austria appears to be strongly gendered and often migrant-dominated. However, there are sector-specific differences in terms of age and employment status. Riders are predominantly younger and male, with women making up only a small proportion of the workforce, possibly due to the higher risk of harassment and safety concerns. Working as a rider requires little language skills or formal qualifications, so it is not surprising that a large proportion of riders are not Austrian nationals. Employment status varies across platforms. Lieferando hires couriers as employees, while others, such as Foodora and Wolt, primarily offer freelance contracts. The taxi and ride-hailing industry is also male-dominated. In terms of citizenship, around 70% of taxi and ride-hailing drivers in our survey have Austrian citizenship, most of them are first- or second-generation migrants. Taxi drivers are usually in their 40s and 50s, and most expect to do this job until they retire. In contrast to food delivery drivers, taxi drivers are never directly employed by the platforms but work as self-employed individuals or as employees of a taxi company that cooperates with the platform.

In contrast, women are overrepresented in platform work for cleaning and care services, aligning with traditional gender roles in these occupations. This sector also has a high share of migrant workers. However, the workforce is highly fragmented, often working informally as solo contractors or as employees of subcontractors. The click-work sector, while lacking detailed demographic data, appears to predominantly feature self-employed workers engaged in a wide range of tasks from low-skill to high-skill levels.

Overall, employment patterns across these industries are heavily gendered, with men making up most of the workforce in the delivery and ride-hailing sectors, while women dominate the domestic sector. Full employment through the platform is rare across all industries, with most platform workers operating as self-employed individuals, freelancers, or employees of subcontractors.

Income and Working Conditions

Working conditions in the different platform sectors in Austria reveal different challenges and complexities. In terms of the food delivery sector, the three studies discussed found that bicycle riders value the flexibility offered to them and the cycling itself. However, they are often dissatisfied with pay and face significant risks, including traffic risks and harassment, especially for female riders. Care workers and cleaners report low hourly rates, unpaid customer acquisition and, like riders, safety concerns, including violence and sexual harassment by customers. Click workers, like other platform workers, value the flexibility and autonomy offered to them, but are uniquely faced with global competition that puts pressure on their wages. Platform workers in the taxi sector struggle with high referral fees and price pressure that reduce their income, and sometimes must deal with aggressive passengers.

Across most industries, similar issues emerge regarding inadequate pay as well as safety concerns in road traffic and interactions with customers, particularly for women. Interestingly, across all industries, only a few platform workers seem to have concerns about the protection of their personal data and the use of GPS tracking software by platforms.

Income dependency

An analysis of the income dependency of platform workers in Austria is only partially possible due to insufficient data. In the taxi and ride-hailing sector, most drivers are highly dependent on their jobs as taxi drivers, as they have no other sources of income and often provide financial support to their families. However, this dependency relates to their income from all of their income gained from the trips they carry out they, not just those mediated by online platforms. Therefore, our data does not reveal the extent of their dependency on work mediated by platforms. Among riders, 80% rely on their income from this activity to pay bills, and a quarter to support family members. According to Vogel and Köszegi (2023), most care workers use platform income as a supplement to other earnings. In contrast, cleaning workers active on the platform ExtraSauber, according to Griesser et al. (2023), work 20-30 hours weekly via the platform, indicating a higher degree of dependency. The study by Schüßler and Maric, though based on only 25 interviews with highly skilled click workers, suggests that these workers are more dependent. Some participants expressed concerns about the stability of their income, particularly due to the risk of account terminations (Maric & Schüßler, 2024). Overall, there is a need for more data and research to compare dependency across sectors.

Collective action

Collective actions among workers significantly vary between the analysed sectors. In the ride-hailing sector, activists and trade unions have arguably been quite successful in establishing works councils at the two largest platforms, Lieferando and Foodora, as well as in negotiating a collective agreement. Activists closely cooperate with unions which most food delivery couriers view favorably (Geyer & Prinz, 2022; Geyer, Vandaele, & Prinz, 2023). However, a major issue that remains is that free service providers, which account for the majority of couriers, are not covered by the agreement and are not represented by works councils.

The taxi and ride-hailing industry too has a collective agreement and highly engaged workers. However, trade unions are perceived less favourably than in food-delivery and trade union membership is by Austrian standards very low. As discussed in Chapter 4, one important factor seems to be unions' perceived inability to improve drivers' working lives. As noted in Chapter 2, the collective agreement applies exclusively to employed drivers and does not extend to self-employed drivers working with online platforms.

In the domestic work sector, union engagement is notably lower. Vogel and Köszegi (2023) found that platform-mediated care workers have limited knowledge of unions and collective representation, and their fragmented and isolated work environment poses significant challenges for union organization. Similarly, Wiesböck, Radlherr, and Vo (2023) highlight that the undeclared status and spatial and linguistic fragmentation of cleaning workers hinder collective action. Click-workers face unique challenges in collective action due to the highly individualized nature of their work and intense global competition, which undermines collective organizing as workers prioritize securing jobs over collaboration.

6 Conclusion and policy recommendations

Taxi industry

The survey results show that most (70%) employed and self-employed drivers enjoy their work and appreciate the autonomy and flexibility that comes with driving a taxi with three quarters of respondents stating that they feel like their own boss and that they can decide for themselves when and how much to work. 58% and 47% respectively further said enjoying driving and interactions with customers are reasons for their working as taxi drivers. The proportion of respondents who are (somewhat) satisfied and (somewhat) dissatisfied with their working conditions is the same at 37% and 38% respectively. However, only a quarter of respondents are satisfied with their income. Furthermore, many respondents experience degrading situations at work: Only one third said that within the last months, they have never been subjected to threats, discrimination and customers refusing to pay the full fare.

Three quarters of the respondents work with intermediaries: 23% with radio operators, 32% with platforms and another 21% with both types of intermediaries. Drivers mostly acknowledged that radio operators and online platforms make it easier for customers to order rides. However, they also view intermediaries critically with a significant majority agreeing that both, but in particular online platforms, try to push down fare prices, that the Viennese “price band” provides them with an unfair competitive advantage and that the level of referral fees should be regulated by law or through collective agreement. In addition, 62% of platform users said they cannot estimate how much they will earn from a drive referred to them by an online platform because they are not shown the route and fare price before accepting it.

In the context of algorithmic management, 80% of platform users report that their performance is assessed. However, within this group, only 20% believe they can appeal against unfair evaluations, and just one-third perceive the evaluation system as fair. By comparison, among drivers working with radio centres, only 35% believe their performance is evaluated. Of these, 50% consider the evaluation system to be fair, and approximately 47% report having the option to appeal unfair evaluations.

Despite many similarities, we thus find that online platforms are generally viewed by drivers as more negatively than radio operators. The most instructive statistic in this regard is that most of the drivers (44%) see the overall effect of radio operators on their work as positive, only 25% say the same about online platforms with 53% regarding platforms as a net negative. Most importantly, even among drivers using platforms 91% say that they try to push down fare prices and a plurality (45%) view their overall effect as negative. Despite these criticisms, it is important to highlight that drivers who work with online platforms rate their working and income conditions only marginally worse than those who never drive for platform companies.

Regarding collective action, the results show that a significant share of taxi drivers has engaged in different types of political activism and most drivers have regular weekly contacts with other drivers face-to-face, through chat groups and on social media. Despite the high level of engagement and networking among themselves, very few drivers are union members. An important reason for this seems to be that most (76%) non-unionized drivers have little confidence that Austrian unions can improve their wages and working conditions, and many (74%) do not feel that unions represent their interests. At the same time, 88% of employees agree that there is a need for a strong union to represent their interests. The most commonly cited area in which drivers would like to see more support from trade unions is improved political representation of their interests (77%). These findings indicate that there is clear demand for unions – or another political actor for that matter – to champion drivers' interests.

Finally, financial matters were most often cited as challenges with high gas prices, the taxi tariff regulated fare, taxes and social insurance contributions topping the list. Interestingly, these three issues were also the most frequently mentioned concerns of employed drivers followed by price competition by online platforms and the level of referral fees charged by intermediaries with the minimum wage for drivers only being the sixth most cited challenge, but still by 87% of employed drivers. This suggests that employed drivers see their biggest challenges in the political arena and that (collective) wage negotiations, the traditional bread-and-butter of trade unions, is less of a concern. Lastly, drivers in Vienna also mentioned the level of referral fees and price competition by online platforms as principal concerns.

Comparative analysis

The comparative analysis highlights the diversity of platform work and platform workers in Austria. In the four sectors studied—food delivery services, passenger transport, domestic services, and click-work —the workforce appears to be highly gendered, with the first two sectors predominantly employing men and the domestic services sector, including cleaning and care work, predominantly employing women. Furthermore, many platform workers across industries are migrants. Online click-work, even though 3.1 percent of the Austrian working age population have been found to engage in it (Piasna, Zwysen, & Drahokoupil, 2022), remains understudied and little information on its workforce is available.

Regarding working conditions, platform workers value the autonomy and flexibility their work provides. Like taxi drivers, food delivery riders largely report that they enjoy their work. At the same time, our analysis highlights some common challenges, including inadequate pay and safety concerns, particularly for female platform workers. An analysis of income dependency is only partially possible due to the limited available data. The existing data shows that at least a quarter of riders are highly dependent on their income from this activity. Conclusions about the income dependency of platform workers in the care, cleaning, and click-work sectors are only partially possible.

There are large differences between sectors with regard to the union organisation of platform workers and other forms of collective action. In the food delivery sector, there is a collective agreement for employed delivery drivers and works councils at two of the largest platform companies. The organisation of delivery drivers is fostered by the Riders Collective, a group of worker activists supported by the trade unions and the Chamber of Labour. Most food delivery riders have a positive view of unions and a basic willingness to join. There is also a collective agreement for employed drivers in the taxi sector, but only a few drivers are unionised, and the unions are often perceived as ineffective and not representative of the interests of drivers. In the areas of domestic work provided via platforms and click-work , the studies examined show no signs of union organisation or other forms of collective action, which, according to these studies, can be attributed to a lack of contact between platform workers, language barriers and limited knowledge of and contacts with institutions of the Austrian social partnership.

Policy recommendations

The primary goal of the Driver Survey project was to collect novel data on the working lives of taxi drivers in Austria and to compare their experiences with research on platform work in other sectors. As such, the project was mainly concerned with understanding working conditions and less with developing policy solutions to address issues uncovered during the research. However, the findings highlight some challenges which are of particularly high importance.

Price transparency for drivers: A principal complaint by drivers cooperating with online platforms is that they are not shown the fare price and route before accepting the order. In combination with the (perceived) inability to cancel orders after they accepted them and the fact that drives referred by platforms usually have a fixed price, this results in drivers unwittingly accepting orders which can be financially non-viable for them – for example because the distance is too long or because traffic on the route leads to delays – but which they must complete, nevertheless. Drivers are put in a particularly troubling situation if the fare prices they unknowingly agreed to are below the legal limit which, as some drivers reported, puts them at risk of being fined for violating the taxi tariff.

Some respondents asked for the price band and the option to offer fixed fare prices to be abolished and for fare prices to be exclusively set by taximeters. This option would solve the transparency problem because with metered fares, the risk of delays would be then borne by the customer, not the driver. However, fixed fares are popular with customers as they provide price transparency for them (Bundeswettbewerbsbehörde, 2020). A less intrusive remedy could be to require all intermediaries to show drivers the same information as customers – route and fare price – when offering a fixed price order.

The Viennese taxi tariff and referral fees: Even though the level of the Viennese taxi tariff was last raised in June 2023, shortly before this survey was conducted, the current level of the local taxi tariff was the second most cited out of ten listed challenges among Viennese drivers with 96% describing it as very important or rather important challenge. In answer to open questions and during a focus group, drivers explained that it was especially the 20% price band in combination with referral fees of around 18% charged by some intermediaries that caused problems. In the words of one driver:

"*Minus 20% plus minus 18% = -38%. And that as a fixed price. It really is slavery.*"

We cannot tell from our data what fees intermediaries charged and how often they offer fare prices at the bottom of the price band. However, the fact that 91% of drivers across Austria believe that online platforms are intentionally trying to suppress fare prices and that 83% believe that referral fees should be regulated certainly indicates that platforms undercutting the regular tariff is common and that there is a strong demand for some sort of intervention on fees. More research and consultations between the involved parties are necessary to formulate policy solutions considering the interests of all stakeholders – taxi drivers and entrepreneurs, intermediaries and consumers – but ideas to be considered could include reducing the range of the price band (e.g. to +/-10%) or setting a minimum pay, by law or through collective negotiations, self-employed drivers or taxi companies must receive after all fees are accounted for.

Trade unions – fight for relevance in the political sphere: For trade unions to improve the lives of taxi drivers and be perceived as effective by drivers, our findings suggest that championing drivers' political interests is important. Increasing the taxi tariff, lowering gas prices as well as taxes and social insurance contributions or reducing bureaucracies for drivers or changing traffic regulations to facilitate the onboarding and offloading of passengers are all issues drivers feel strongly about.

Distinguish between problems of the "platform economy" and industry-specific challenges and address both: The comparative analysis showed that there are some commonalities of online and platform work across industries in Austria, but also important differences. One issue that cuts across all platform work industries analysed is the platform workers' dissatisfaction with their income, which can be partly attributed to the behaviour of platforms, for example when platforms push down fares or charge fees to platform workers that are perceived as too high. Another issue that particularly affects women in the food delivery, care and cleaning sectors is sexual harassment. The design and functioning of platforms can, as the study by Wiesböck, Radlherr and Vo shows, influence the risk of harassment that women are exposed to, for example when domestic workers are expected to include a photo in their advertisements (2023). Other challenges are industry-specific and are more related to the respective profession than to the technology used. Clear examples of this are concerns among taxi drivers about traffic and parking regulations or gasoline prices.

Efforts to address the evolving challenges of new technologies and market transformations are essential. These must go hand in hand with tackling longstanding, industry-specific issues that predate these changes. A fair and effective policy response requires equal attention to both.

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