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GETTING THE GOODS:
TRADE UNIONS AND STRATEGY IN THE QUICK-COMMERCE SECTOR

Steve Rolf, Wil Hunt and Rachel Verdin

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European Political Foundation - Nº 4 BE 896.230.213
Avenue des Arts 46, 1000 Brussels (Belgium)
www.feps-europe.eu
@FEPS_Europe

UNI - GLOBAL UNION EUROPA

Rue Joseph II 40, 1000 Brussels, Belgium
www.uni-europa.org
@UNI_Europa

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EXECUTIVE SUMMARY

The rise of quick-commerce (q-commerce) platforms has reshaped the retail industry, posing new challenges for trade unions. This report examines q-commerce, which promises superfast delivery of groceries, often under 30 minutes, and the potential threats it poses to established collective bargaining patterns and trade union strongholds in bricks-and-mortar retail. It draws on desk research and in-depth qualitative interviews with experts, industry stakeholders, and q-commerce workers in Germany, Spain, and the UK.

The report contextualizes the rise of q-commerce and considers how trade unions could react to its emergence at a macro- and workplace level. The findings of the companion report on the business dynamics, working conditions, and policy recommendations surrounding q-commerce are summarized. Despite turbulent business dynamics, some variants of q-commerce will likely continue. Given the evidence presented of poor working conditions, unions should devote efforts and resources to organising q-commerce for the protection of workers and to ensure q-commerce firms do not undermine the conditions of those working in adjacent retail and logistics industries.

The report outlines a critical power resources approach (PRA) framework to adjudicate the potential for organising in q-commerce, given the structure of the industry and its labor markets. The report maps the structural, associational, institutional, and societal power resources available to q-commerce workers and unions. It concludes by drawing together provisional lessons from the broader analysis and particular cases in Spain, Germany, and the UK, before suggesting a way forward.

Q-commerce firms rely upon smooth flows of goods through supply chains, warehouses, and onto final-mile delivery vehicles. The vulnerabilities of the just-in-time model, combined with the large outlay on capital assets and the dense spatial concentration of workers inside and outside of dark stores, collectively give q-commerce workers the ability to shut down services with relative ease compared to similar workers in other sections of the platform economy. However, the weak business position limits the potential for q-commerce firms to absorb wage increases compared with traditional retailers. At the same time, the widespread use of precarious and migrant labor makes recruitment by unions and worker organisations difficult.

In Spain, the CC.OO, UGT, and CGT have successfully begun to recruit and organise workers, with impressive successes in organising works councils in Catalonia. In Germany, workers in q-commerce are predominantly organised through autonomous actions from riders' collectives, and associational power is yet to be consolidated into durable forms of structural or institutional power. In the UK, little direct organising has happened, and unions have focused on improving the institutional framework for platform work through legalistic strategies.

In conclusion, unions could benefit from paying close attention to both business trends in the sector and efforts at organising q-commerce workers. The institutional environment, an industrial relations system that favors collective bargaining, and a grassroots body of organised workers moving between other parts of the platform economy prepared to take semi-autonomous collective action are crucial for success. Autonomous worker collectives have achieved impressive organisational feats. The report suggests that unions should build on workers' associational power to form works councils to challenge poor employment practices, recruit workers to unions, and build structural power that can persist.

1. INTRODUCTION

Digital platform technologies are reshaping retail work in ways that pose new challenges for trade unions. This policy study examines the rise of quick-commerce (q-commerce) platforms. Targeting consumers in urban settings, these new startups typically promise the delivery of groceries in under 30 minutes. Although still small, compared with the overall grocery sector, they have grown dramatically since 2020. Q-commerce poses potential threats to established collective bargaining patterns and trade union strongholds in bricks-and-mortar retail, while questions remain as to its significance, likely durability and vulnerabilities. Drawing on desk research and in-depth qualitative interviews with a range of experts and industry stakeholders (n=15) and q-commerce workers in four firms across three countries (Germany, Spain and the UK) (n=14),[1] this policy study contextualises the rise of q-commerce, before considering how trade unions could react to its emergence at a macro- and workplace level.

> *Given the powerful evidence presented of poor working conditions in this new and growing sector, unions should consequently devote efforts and resources to organising q-commerce.*

Firstly, it summarises the findings of the companion policy study on the business dynamics, working conditions and policy recommendations surrounding q-commerce. The main message here is that, despite turbulent business dynamics, some variant of q-commerce will likely continue. Given the powerful evidence presented of poor working conditions in this new and growing sector, unions should consequently devote efforts and resources to organising q-commerce. This is both for the protection of workers themselves, and to ensure q-commerce firms do not undermine the conditions of those working in adjacent retail and logistics industries. Secondly, it briefly outlines a critical power resources approach (PRA) framework with which to adjudicate the potential for organising in q-commerce, given the structure of the industry and its labour markets. Identifying q-commerce as possessing characteristics of both traditional *and* platform work, this section maps the structural, associational, institutional and societal power resources available to q-commerce workers and unions. Third, it outlines the current state of play in three important European q-commerce markets. In Spain, traditional unions have made impressive headway by leveraging institutional power to build associations and increasingly durable structures. In Germany, "independent" unionism is strongest in the form of rider collectives, separate from established trade unions, which have focused on developing associational power but have so far not built durable forms of structural power. Finally, in the UK, little direct organising has happened, and unions have focused on improving the institutional framework for platform work through legalistic strategies. It concludes by drawing together provisional lessons from the broader analysis and from these particular cases, before suggesting a way forward.

2. PLATFORMISATION, WORK AND Q-COMMERCE

Platforms enable consumers to purchase goods and services online through smartphones, with the expectation that these are provided on demand. To fulfil this expectation, workers are typically co-ordinated and managed by algorithms to deliver goods and services in rapid time. Platform working arrangements are often highly flexible and the typical platform worker does so casually, to earn supplemental income. However, a smaller but growing pool of full-time platform workers are increasingly dependent upon platforms for income. Platform workers are usually self-employed, exempt from legislation covering social and economic protections like minimum wages and paid leave, and earn piece rates (which make them bear the costs of downtime). Because turnover is high and workers are often understood by themselves as well as by courts to be independent contractors, the platform economy is hostile terrain for trade unions – while its growth threatens pre-existing collective-bargaining arrangements and areas of union strength.[2] For this reason, the combination of advanced technologies with flexible working has led critics to understand the platform economy to be spearheading the broader shift toward gig work.

> *Using networks of micro-fulfilment centres (MFCs) – known more commonly as "dark stores" because they are closed to the public – dotted around high-density urban locations, q-commerce firms aim to make grocery deliveries to customers' homes in under 30 minutes.*

Because platforms are "asset light" (Uber owns no cars, and Booking.com owns no hotels), they are easily scalable to new locations without substantial capital outlay. The main expenditure of such services is often worker and consumer subsidies.[3] By offering higher wages and/or cheaper services than incumbents, platforms hope to "blitzscale" their way to market dominance using abundant venture capital. Only after reaching massive scale do such firms pivot toward profitability – typically through cutting payments and hiking consumer costs. While these broad principles of platformisation were first applied to work in non-tradable services like taxis (Uber, Lyft) and takeaway food (Deliveroo, Glovo), they have begun to spread far beyond these sectors.

Q-commerce introduces the logic of on-demand platform logistics to the grocery retail sector. Using networks of micro-fulfilment centres (MFCs) – known more commonly as "dark stores" because they are closed to the public – dotted around high-density urban locations, q-commerce firms aim to make grocery deliveries to customers' homes in under 30 minutes. Pickers in dark stores receive orders, which they rapidly pack and hand over to delivery riders (typically using e-bikes or mopeds). Smartphone-based routing software then guides riders to customers' homes. The sector is backed by a wave of venture capital aimed at "blitzscaling" q-commerce startups to commercial success through prioritising growth over profitability – even if this means losing money in the short- to medium-term.[4]

Despite its clear origins in the platform economy, q-commerce does not share all of its traits. Getting a combination of bulky and low-value chilled, frozen and long-life products to consumers nearly instantaneously is challenging. It necessitates substantial capital investments in assets – both tangible and intangible. This makes q-commerce platforms quite distinct from traditional "asset-light" platforms. Consider what it takes for a q-commerce firm to scale up by entering a new city versus (for example) Uber. Uber would – at most – open a small office where drivers could register for work, and bear marginal overhead costs for identity and licence checking, as well as dealing with customer complaints and technical problems (much of which would likely take place remotely in back-office locations elsewhere). Cars – the key physical asset for the transportation company – would be provided by "independent" drivers (or loaned/hire-purchased through a third-party service). Most of the risk of working for the platform is borne by the drivers, since a piece-rate payment system means they are not paid for downtime. Subsidies for riders and consumers would likely represent the main cost.

> *Q-commerce firms are leaving a physical imprint upon the economic landscape – in the form of warehouses and MFCs, stock, bicycles and contracted employees.*

By contrast, for (for example) Getir to become established in a new city, it must invest in research to carefully consider the most viable available real estate to use as dark stores (by purchasing density, income and other kinds of socio-economic demographic data from third parties). Local authorities and residents may have to be liaised with to ensure an MFC does not meet with nuisance complaints or legal action. Urban rents are expensive, and property contracts can be long term, making locational mistakes expensive. The firm must either purchase warehousing and other capital equipment (along with labour) to kit out its dark stores itself, or pay a third-party provider like Proficircle or Fabric to do so. Bikes and other delivery equipment will have to be sourced. Supply and delivery arrangements and contracts will need to be put in place with goods wholesalers. It must then directly hire a large enough pool of pickers and riders to ensure a wave of customer demand (incentivised by subsidies). Depending on the country in question, these labour contracts can be permanent, although in some countries fixed-term contracts are used and, more recently, turbulence in the sector has prompted the growth of more precarious forms of employment. As such, while q-commerce has scaled rapidly, doing so has necessitated very expensive outlays of investor capital in real estate, goods, equipment, workers and intangibles – all markers of (what economic geographers like Hess[5] term) territorial *embeddedness*.

For these reasons, it would be a mistake to associate q-commerce entirely with pure platform players, which simply match customers with retailers and/or delivery workers ("aggregators" in the language of the industry). "Asset-light" aggregator platforms are hostile terrain for unions, in part because they can easily disappear without leaving much of a trace.[6] By contrast, q-commerce firms are leaving a physical imprint upon the economic landscape – in the form of warehouses and MFCs, stock, bicycles and contracted employees. Furthermore, while some consumer demand is likely to be ephemeral (based upon subsidies alone), the sentiments and expectations of other consumers are also likely to be permanently altered in favour of rapid delivery through repeated use of q-commerce platforms.

In summary, the "asset-heavy" nature of q-commerce platforms seems to mean that the sector is (in some form or another) likely to:

1) be an enduring feature of the retail landscape; and

2) offer more favourable terrain than the platform economy at large for worker organising.

3. PRA AND Q-COMMERCE

The PRA to labour studies offers a conceptual framework for assessing the potential strength of workers' collective organising in the q-commerce sector. PRA analyses examine to what extent workers have both *structural* power (within the workplace and in the labour market), alongside the extent to which they are able to strategically mobilise these power resources to improve their lot – through association (workplace organising), societally (through extra-workplace alliances) and institutionally (through legislation, new institutional frameworks, etc.).

PRAs typically focus first on mapping workers' structural power, as a means of identifying the best organising strategies. However, structural power does not translate directly into associational and other forms of power. Workers with apparently high levels of structural power can nevertheless possess quite different capacities to exert shopfloor strength.[7] Furthermore, exerting associational power is potentially achievable for workers in relatively structurally weak workplace and labour market positions.[8] PRAs often remain confined to a single workplace or sectoral perspective, rather than examining broader national institutional arrangements or the economic and geographic connections across industries – both of which can significantly impact union strength and organising capacities, in particular, labour market legal frameworks and industrial relations conventions. As such, here we follow Nowak[9] in applying a critical PRA framework, which sets q-commerce within this broader context.

A PRA can assist in analysing and developing trade union strategy for the q-commerce sector in three ways:

1) **identifying the industry's broader business and institutional dynamics**, with the goal of

2) **ascertaining the strategic potential of q-commerce workers** within this economic and institutional context; and – with these structuring conditions in mind – by

3) **mapping paths to enhancing workers' associational power**.

Platform workers generally have low levels of structural power – although this has not inhibited platform workers from successfully and creatively organising.[10][11] But q-commerce possesses important differences from other types of locational platform work, with implications that may enhance workers' structural workplace power.

1) Q-commerce firms' core value-added service is reliable performance of on-demand delivery. As such, their just-in-time supply chains are intrinsically vulnerable to worker disruption. Any delays in delivery times or stocking shortages risk upsetting their core promises to consumers and upsetting tightly orchestrated smooth flows of goods through space.

2) Relatedly, q-commerce firms invest substantial amounts of capital in tangible assets, which must be continuously utilised to generate revenue. As Moody puts it, the "embedded capital [and] large concentrations of manual logistics workers […] make [logistics sites] key strategic 'chokepoints' for the exercise of workers' and trade union power".[12]

3) Q-commerce warehouses concentrate workers together in relatively non-hierarchical spaces, where managers often have weak authority and are only marginally better remunerated than shopfloor workers – giving all workers a shared collective interest and substantial face-to-face contact, which facilitates organisation.[13]

4) Employers prefer to maximise worker retention and control through contracts for employment (albeit without compromising flexibility), adding some labour market structural power to workers' workplace structural power.

On the other hand, q-commerce workers possess some structural vulnerabilities. The rise of giant grocery supermarkets enables them to squeeze smaller dispersed producers and increase profits.[14][15] Supermarkets can exert direct pricing leverage on producers, or do so through wholesalers – many of which are in a subordinate relationship to supermarkets (or, increasingly, owned or controlled by them).[16]

However, q-commerce firms are in a market-based (rather than dominant) pricing relationship with their powerful wholesaler suppliers. Gorillas UK, for instance, sources substantially from AF Blakemore (a wholesaling subsidiary of Spar group) and Booker (tied to the Tesco group).[17][18] This places them in a less favourable position to pass the costs of higher wages down the supply chain. Secondly, intense competition in the sector and pressure for profitability from investors makes it difficult, even for "better" q-commerce employers, to raise wages or improve conditions individually. Thirdly, low-skill labour markets in Europe remain weak enough that employers continue to accept an extremely high turnover of workers, even where training is being provided in-house.[19] Moreover, q-commerce makes extensive use of sometimes vulnerable migrant labour (although the prevalence of employment contracts means migrants are typically documented, rather than undocumented). Finally, the propensity for governments to use labour platforms to warehouse low-wage workers (who might otherwise be unemployed), rather than pay unemployment benefits, is evident in their continued reluctance to more tightly regulate the sector[20] – as discussed in more detail in our companion report.[21]

> *From a structural perspective, q-commerce workers appear to be in a stronger position than most locational platform workers, while still possessing some weaknesses compared to traditional bricks-and-mortar retail sector workers.*

In summary, from a structural perspective, q-commerce workers appear to be in a stronger position than most locational platform workers, while still possessing some weaknesses compared to traditional bricks-and-mortar retail sector workers.

The next section of this policy study examines three short country case studies, to assess successes and failures of developing attempts to build associational power in q-commerce. We map the structural strengths and weaknesses of q-commerce workers, outlined above, onto national industrial relations systems. In doing so, we examine how (formal and informal) labour market institutions and trade union landscapes constrain or expand q-commerce workers' capacity to organise collectively. We first consider the Spanish case, where traditional union confederations (the *Comisiones Obreras* (CC.OO) and the *Unión General de Trabajadores* (UGT), along with the *Confederación General del Trabajo* (CGT)) have made impressive advances in organising the sector. Next, we examine the German case, where "independent" unions – new and grassroots-led worker organisations – have taken a lead in building organisation amongst q-commerce workers. Finally, we consider the UK case, highlighting where unions have used institutional power to drive change, while also recognising the limited headway that has been made for q-commerce workers.

4. SPAIN

In Spain, traditional unions – led by the CC.OO (Workers' Commissions) – have achieved impressive early successes in organising the q-commerce sector. The sector is dominated by two main players: Getir (as in much of Europe) and Glovo. In Catalonia, both of these firms now host work councils, elected by organised workers to negotiate terms and conditions with management. We first present an overview of the industrial landscape and the development of platform work to premise these developments before going onto address the union achievements and challenges for q-commerce workers.

On January 27th, 2023, Barcelona city hall approved a total ban on dark stores. The research reported on here has been conducted before that decision.

4.1 MAPPING THE INDUSTRIAL CONTEXT AND OVERVIEW OF PLATFORM WORK

The national industrial relations context is one reason why traditional unions have scored successes. Spain has a very high rate of collective bargaining coverage (around 85%), which applies to all firms and employees, regardless of union membership. Two large confederations, the UGT and the CC.OO, are responsible for most union membership and agreements. Most collective bargaining agreements are national and sectoral, although it is possible to conclude these at regional and firm levels too.[22] However, as the platform economy has expanded, workers have found themselves beyond the coverage of collective-bargaining frameworks due to the widespread use of independent contractors.[23] Such platforms took advantage of very high rates of unemployment (especially youth unemployment) during the 2010s to undermine working conditions and bargaining arrangements. Nearly one fifth (18%) of the workforce in Spain had carried out platform work at some point, as of 2018, while around 9% worked more than ten hours per week on, or earned at least quarter of their income from, platforms.[24]

Platform worker mobilisation, against the shift towards flexible and precarious work, has, nevertheless, been growing in various parts of Spain's platform economy.[25][26] For instance, in December 2021, CC.OO and the UGT signed a collective agreement with the aggregator platform Just Eat.[27] The institutional environment is becoming far more favourable towards platform workers too. The 2021 Riders' law, passed by the social democratic coalition government in 2021, mandates riders are made employees of delivery platforms – although implementation remains very uneven.

Q-commerce took off rapidly in Spain during the pandemic. Getir and Gorillas were the chief foreign entrants. Meanwhile, Glovo – a local platform, which began as an aggregator focusing on takeaway food – also branched out into dark-store-based grocery delivery. Glovo was acquired by the German firm Delivery Hero in 2022. Gorillas withdrew its Spanish operations in 2022 (along with the smaller GoPuff), leaving Getir and Glovo as the two major q-commerce players in the country. In Barcelona, which, along with Madrid, is the biggest operations site of these two firms, Glovo had ten dark stores and around 300 workers as of mid-2022, while Getir had 12 dark stores and 800 employees.

Glovo's q-commerce business is operationally separate from its hot food/takeaway delivery business. Riders in the latter area are mostly engaged as self-employed, independent contractors. Legal challenges to this platform model are mounting, with Glovo receiving a €79 million fine from the Labour Inspectorate on the charge of false self-employment in September 2022.[28] In its q-commerce business, however, Glovo riders (and pickers) are directly employed. Since Getir's Spanish operation also uses an employment model (as it does elsewhere), the large majority of q-commerce workers in Spain are contracted employees. However, the use of temporary labour agencies, such as JT Hiring, rather than direct employment of these workers, is a cause of concern for workers.

4.2 UNION ORGANISING: ACHIEVEMENTS AND CHALLENGES

Trade union interviewees noted that organising amongst employees was an easier proposition than amongst the self-employed for several reasons. One is because of the high proportion of unregistered migrant workers working in Spain's platform economy. Since self-employed riders are able to share accounts (to avoid "control" tests of employment status), it is relatively straightforward for a single worker with residency rights to subcontract or pass an account between undocumented workers. These most vulnerable workers are understandably reticent to organise, since doing so could draw attention to their status (while winning employment status would make it very difficult for them to continue to work). By contrast, since sharing accounts is not possible for contracted employees, this disincentive to organising amongst this layer of workers disappears. Moreover, contracted employees are in a somewhat more secure employment situation and are more willing to take collective action, while workforce turnover is somewhat lower than in sectors using independent contractors.

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Organising in the Spanish q-commerce sector is reported to have begun amongst workers associated with the CGT riders collective in Barcelona, which had existing members in Glovo's takeaway food operations. The CC.OO also began recruitment efforts amongst Glovo workers in the summer of 2021. Kickstarting these organising efforts were pre-existing conflicts amongst Glovo's self-employed takeaway food riders, who were encouraged to take a pay cut to compete amongst themselves for orders in August 2021.[29] Dark-store riders and pickers became involved in this dispute (despite their different contractual status) and joined protests supported by the CC.OO and UGT in central Barcelona. To recruit members, the regional CC.OO subsequently hired organisers with migrant backgrounds, who worked in the sector, to approach colleagues outside of dark stores and in other opportune locations. The profile of migrant workers in Spain was reported to be an important factor in organisation by some interviewees. Many q-commerce workers have migrated from South American countries with strong trade union movements and have Spanish as a first language; they are often more willing to organise compared with migrants from different backgrounds facing significant language barriers. They further organised service centres to provide cycle and scooter repairs, break rooms and refreshments for workers. These physical spaces made it possible for organisers to discuss workplace and union issues with workers, away from management.

Organising efforts enabled a dark-store strike to be organised in Barcelona in late-August 2021, aimed at improving pay and conditions (such as enforcement of rights to regular breaks and leave) and bringing employment contracts outsourced to temporary employment agencies in-house. Interviewees commented that the strike was not difficult to organise, given the high levels of anger amongst most workers, alongside the ability to discuss possible responses during the regular face-to-face communications that q-commerce work entails. Following a very high participation rate, and the effective complete closure of Glovo's q-commerce operations in Barcelona, the firm entered into negotiations after three days of action. Subsequently, in May 2022, the CC.OO successfully organised an election for a Glovo workers' council with an 80% participation rate.

BOX 1: Organising q-commerce amongst hostile employers in the Netherlands

In the Netherlands, the FNV union has been organising amongst the three major q-commerce players: Gorillas; Getir; and Flink. Despite some successes, the union has also met with a hostile response, which interviewees claim is common of q-commerce firms' attitude toward worker representation.

After the Radical Riders' autonomous collective in Amsterdam reached out to the union, FNV decided to prioritise q-commerce organising. Eschewing a legalistic strategy of challenging labour violations through the courts, instead, it began to play a proactive role in recruiting riders and pickers through sending organisers into dark stores. Here, they found managers to be quite hostile to the unions, with frequent attempts made to block organisers from speaking with workers (even outside of stores in public spaces) and propaganda being broadcast to workers about supposed union mistruths.

Despite the hostile reception from management, the union successfully recruited significant numbers of workers. Issues, such as work intensification and speed-up; a lack of breaks; and a reduction in staffing, despite increasing demand; were widespread – along with concerns over health and safety. A particular target for campaigns beyond immediate workplace grievances is to secure a collective agreement for the retail sector (see also the case of Spain discussed in Section 4). However, in the meantime, employer hostility continues, with one q-commerce firm firing a leading workplace organiser. In response, unions produced petitions and used a media strategy, including noisy and vibrant demonstrations outside of the firm's headquarters, to campaign for reinstatement.

While Getir is viewed by riders and unions as a relatively "better" employer than Glovo (due to its provision of equipment and use of direct employment contracts rather than agencies, amongst other things), many issues highlighted in our companion policy study continue to affect its workers. Despite a lack of active worker mobilisation, as in Glovo, the CC.OO and worker organisers successfully organised a workplace election in late 2022. With a 40% staff participation rate, they subsequently formed a works council in Catalunya. Recruitment and organisation has been successful, in significant part, because riders and pickers were well aware of the union's successful efforts in Glovo over the previous year.

In both firms, the organising drive amongst riders and pickers and the formation of works councils has led to tangible improvements in working conditions. Glovo brought many riders it had hired through temporary agency contracts in-house and offered them permanent contracts after industrial action. Furthermore, workers involved in the union and works council explained that it had successfully opened a channel of communication between management and workers. Workers' concerns regarding conditions, such as pay, contracts, and health and safety, were beginning to be addressed in a co-operative fashion (even if there was some way to go). By contrast, interviewees were more critical of Getir. They claimed its corporate culture was less welcoming to the works council and that it often dragged heels during negotiations or failed to act on commitments. For this reason, the CC.OO and the council have recently decided to file a complaint with the government's Labour Inspectorate, based upon an accumulation of grievances, including failure to notify workers about eligibility for benefits, health and safety information, and concerns over the maintenance of equipment. Despite this, the firm has begun to comply with some of its commitments, including the establishment of a health and safety committee (including a taskforce dedicated to surveying staff physical and mental health), following pressure from the works council and the unions. A major aim for the CC.OO in q-commerce is to win coverage for q-commerce workers under the collective agreement signed in the retail sector, rather than the inferior agreement in the courier sector currently adopted by employers.

5. GERMANY

In Germany, traditional unions have struggled to make headway in the q-commerce sector. At the same time, grassroots unions and workers collectives have achieved some successes in organising workers and establishing works councils in q-commerce firms. While this has provided workers with some voice and representation, turning this into better working conditions and less precarious employment was an ongoing challenge. The following two sections, firstly, map out the industrial context in Germany and organising in the wider platform economy in the country, and secondly, outline the achievements and challenges of organising specifically in q-commerce.

5.1 MAPPING THE INDUSTRIAL CONTEXT AND OVERVIEW OF PLATFORM WORK

The German labour market has a tradition of tripartite social partnership between strong labour unions, employer organisations and government.[30] As such, several robust legal mechanisms, such as rights to set up works councils, enable workers to exert influence over workplace decision-making. The proportion of employees that are members of a union is around 18%, but coverage of workers by collective bargaining is much higher at 62%.[31] Wage setting predominantly takes place at the sector or industry level, and while company-level agreements can be made, these must generally offer more favourable terms than higher-level agreements.[32]

However, much like the system in many other countries in western Europe, the industrial relations regime in Germany has seen declining density of trade union coverage since the 1990s. This trend accelerated after the 2008 financial crisis, as countries pursued policies aimed at productivity, competition and job creation, often through increased flexibility for employers.[33] Consequently, recent decades have seen a proliferation in precarious and non-standard employment arrangements in a number of sectors, including construction, healthcare and the meat industry – industries that, like the platform economy, frequently rely on migrant labour. And while unemployment in Germany is low (3.2% of the workforce in 2021), the German economy has a comparatively high reliance on low-wage employment (22.5% in 2018).[34]

Despite the decline in the density of union coverage, both tripartite and bipartite agreements have been reached over the last decade on a number of issues, including pay, skills and the retention of jobs during the 2008 financial crisis.[35] Works councils – technically mandatory in organisations with five or more employees, although in practice are only established when formally requested by a majority of employees – play an important role in representing workers and holding employers to account to collective agreements. While works councils are formally barred from negotiating agreements on pay at the plant level, informally, they often negotiate "employment pacts" on workplace conditions that include pay.[36] Workers can be represented by works councils or trades unions and, in some cases, workers' councils are linked to unions. However, the latter are sometimes seen as carrying out a wider political role than workers' councils, whose role is more limited to the representation of workers within firms and in specific locations.[37]

The retail and wholesale sector is one of the largest sectors in the German economy (behind only manufacturing and health and social care), employing more than 5.3 million workers in 2020 (5.8 million in 2019 before the Covid pandemic).[38] Sales revenue in Germany in 2021 was an estimated €586 billion and grew around 1.5% on the previous year.[39] Grocery retail in Germany has seen above-average growth in 2021 compared to 2020 and 2019 (+0.9% and +13.6%, respectively). Revenue growth in online retail, in particular, was 14.5% and 64.5% for these comparison years. However, the online channel market share in grocery retail is relatively low in Germany (4.1%) compared to some countries, like the UK (13.0%) and France (8.8%).[40]

As in many countries in Europe, the platform economy in Germany appears to be growing. A recent large-scale survey looking at platform work in 16 EU countries indicated that in 2018 around 12% of the workforce in Germany had carried out platform work at some point in the past and around 6% worked more than ten hours per week on, or earned at least quarter of their income from, platforms.[41]

This equates to around 5.6 million and 2.8 million people, respectively.[42] The platform economy as a whole, and particularly on-demand food delivery, is characterised by self-employment and non-standard employment relationships, with relatively low wages, and many workers are first- or second-generation migrants, who may not be fully aware of their employment rights.[43] Moreover, the transitory nature of work in the sector makes it challenging to organise collectively and to establish a works council, which generally requires representatives to have a permanent contract and to have been working for the firm for more than six months.

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Despite these difficulties, there have been some attempts to organise in the platform sector. Analysis of news reports of labour unrest related to food delivery platforms indicates that mainstream unions are the main actors in labour unrest in Europe.[44] However, this does not appear to be the case in Germany, where workers' collectives and informal groups of workers appear to be the main actors. In the food delivery sector, there have been waves of strikes and protest actions in cities across seven countries in Europe, including Germany, although these have been mostly carried out by informal groups and grassroots organising.[45] That is not to say long-standing unions have not been active in the platform economy or have not had some successes. In 2016, Germany's largest union, *IG Metall* (the German Metalworkers Trade Union), opened up to platform and other self-employed workers and promoted and supported a voluntary Crowdsourcing Code of Conduct. This was signed by eight platforms (as of 2018), who agreed to adhere to local wage standards. In addition, the *Gewerkschaft Nahrung-Genuss-Gaststätten* (Food, Beverages and Catering Union) supported food delivery couriers in a number of German cities in attempting to establish a works council. Delivery Hero (who owns Foodora, among other brands) signed an agreement with European Federation of Food, Agriculture and Tourism Trade (EFFAT) unions to establish a cross-border works council and employee representation on the company's advisory board.[46]

5.2 UNION ORGANISING: ACHIEVEMENTS AND CHALLENGES

Our interviews with workers, union affiliates and industry experts, however, indicated that mainstream trades unions in Germany have struggled to make headway in the q-commerce sector and in the platform economy more widely. In contrast, demonstrations and actions by informal grassroots organising and workers' collectives (sometimes with advice from left-wing unions) have had some successes, achieving a level of associational power. *Deliverunion* is a workers collective that was set up to campaign for a workers' council in Deliveroo in Berlin, with help from the *Freie Arbeiterinnen- und Arbeiter-Union* (FAU – Free Workers Union).[47] As of 2020, Deliverunion mostly represents Lieferando workers but is open to riders from other delivery platform and logistic companies.[48]

Workers at Gorillas in Berlin were successful in setting up a works/workers' council in late 2021. Along with Lieferando, Gorillas is now one of the largest food and grocery delivery platforms in Germany, with an active body of worker representatives and both local and regional works councils.[49]

However, while the founding of a works council is a significant achievement, this success was hard fought and took a year-long struggle with management and considerable effort from those involved. The path to securing the works council is charted in the Fairwork report and is summarised in Box 2.

Interviews with experts, Gorillas workers and respondents with links to the works council and Gorillas workers' collective, shed further light on the challenges faced along this path and some of the key developments that facilitated success. In terms of developments that facilitated success, firstly, the interviews highlighted the importance of technology in facilitating communication among workers and building solidarity over common concerns and interests. The collective reportedly grew out of a "no managers" WhatsApp group that was set up to share experiences and help workers support each other. While many of the messages reportedly consisted of worker complaints about the company or specific issues, more structured voices started to emerge from discussions, which would later provide a basis for the collective. Secondly, key events acted as lightning rods for workers to coalesce around. For example, the harsh winter conditions in February 2021 and the failure of the company to suspend operations during extreme weather prompted strike actions. The attempted firing of an active member of the nascent collective, in turn, catalysed attempts to organise for an elective council. Thirdly, the mass firing of workers participating in wildcat strikes in July 2021, and the actions that ensued, helped build support for the November elections that established the works council. Finally, while the Gorillas workers' collective can be seen as a self-organising grassroots collective, legal advice from the FAU appears to have been instrumental in helping the collective contest the termination of the collective member mentioned above.

Alongside these catalysing events, interviewees reported several challenges faced in organising the collective and establishing the works council. Firstly, the difficulty of recruiting and maintaining an active membership, given the high turnover and transient nature of the workforce. Secondly, management was highly resistant to worker complaints and the establishment of a works council. The firm reportedly hired lawyers that employed union-busting tactics, such as firing members for participation in strikes, non-renewal of contracts and withholding wages for six to seven months. Thirdly, lack of experience meant that establishing effective decision-making processes took time. Initially, the collective attempted to reach consensus on all decisions; however, ideological differences and personalities could sometimes make reaching a consensus difficult. As a consequence, the group has moved more towards a voting-based majority decision-making process. Fourthly, as in much of Europe, the legal framework in Germany means that workers' collectives do not have legal protections when taking part in strikes. The collective reportedly considered formally becoming a "coalition" to gain such protections, but decided against the move in the end. Finally, while the collective received some support and advice from more formal trades unions, they reported it was difficult to establish effective relationships because of "irreconcilable ideological disagreements" about what the proper role of a trade union should be. As regards the latter, one of the challenges established trades unions have faced in recruiting members relates to eligibility rules for membership. Interviewees noted that it is difficult for workers to see the point of joining a union when they are often only on a six-month or 12-month contract, and they cannot be recognised as a union member until after three months.

> *Deliverunion is a workers collective that was set up to campaign for a workers' council in Deliveroo in Berlin, with help from the Freie Arbeiterinnen- und Arbeiter-Union (FAU – Free Workers Union).*

BOX 2: The path to a workers' council – the case of Gorillas

A Fairwork report charts how the year-long battle to set up a works council began.[50] In **February 2021**, Gorillas workers in Berlin asked for appropriate winter gear to cope with the particularly harsh winter conditions. When management refused, riders in several warehouses stopped deliveries for consecutive days. Gorillas ultimately complied with the request, following Ministry of Transport advice to suspend operations until weather conditions improved. However, equipment did not arrive until early spring and, upon arrival, was described as inadequate (as echoed in our worker interviews). In addition, other issues, such as miscalculation and non-payment of pay, unpaid sick leave, and lack of management response to issues raised, started to be voiced by staff. This led workers to step up their organising efforts. In **March 2021**, a member of the Gorillas workers' collective grassroots group was fired two weeks before the end of their probation period. This resulted in a court case that contested the termination on technical grounds (following advice from the FAU). The *Gorillas Workers Collective* subsequently drummed up enough support for a general assembly in order to set up an electoral council for a works council.

In **June 2021**, further demonstrations and wildcat strikes were held, following the firing of another worker during their probation period. Demonstrators believed that the real reasons for the termination were due to their now ex-colleague's efforts to fight job insecurity and improve working conditions. Later in June, another demonstration was held outside the Gorillas head office in Berlin. Workers concerns were taken directly to Gorillas CEO, Kağan Sümer, and workers also took to social media to highlight stories of poor equipment and problems with pay to support their demands. The response from management was to send an email to workers bemoaning that some workers were ruining the work experience at Gorillas. They called on workers to treat the company like a family, rather than an employer, but did not acknowledge any company failings. This led to further demonstrations, with some actions closing down operations. Gorillas considered these as wildcat strikes (because they did not have union backing) and laid off 350 workers in response (although some of these were later reinstated following successful court cases). Further wildcat strikes and activism followed throughout the autumn, during which time support grew for an electoral council. In **November 2021**, successful elections were held and a works council was established for Gorillas workers in Berlin.

In Germany, works councils can advocate on behalf of employees and have a number of rights to help them perform their role. These include rights to certain types of information, a right to consultation, the right to decline management decisions in certain instances and a right to co-determination. In the case of the Gorillas works council, day-to-day activities largely revolved around helping individual workers with a range of workplace problems, representing them in disputes with the employer and communicating with management over certain issues. However, despite the success in establishing the works council, translating this success into improved working conditions remains a challenge.

> “*One respondent noted that the only time management seemed to acknowledge the works council was when "it was convenient for them to do so.*”

> *The work of the collective was reported to have led to many productive relationships with workers at other firms in the q-commerce and food delivery sector.*

Interviewees noted that the relationship between the works council and management was not a good one. One respondent noted that the only time management seemed to acknowledge the works council was when "it was convenient for them to do so". In most cases, this is when they are asked to sign off on termination letters. All terminations and disciplinary actions, of which there have reportedly been many, are sent to the works council, with management asking them to agree to authorise the termination. However, in cases where the works council contest a termination, management reportedly regularly ignore their objections. And while there are numerous serious workplace issues that are brought to the works council by employees – including poor equipment, late or non-payment of wages, failure to pay health and accident insurance, "endemic" harassment and bullying, nepotism, and favouritism (often along ethnic lines) – interviewees reported that little action was taken by management when these were raised by the works council. On top of this, the works council were reportedly facing a number of legal disputes with the company. All of the above were reported to consume considerable time and energy, resulting in a lack of resources being the final challenge. The sheer volume of individual issues meant that there was little time for campaigning to improve conditions.

Despite these challenges, interviewees did report several successes arising from the establishment of a works council and from the work of the collective. Firstly, the works council has managed to successfully help numerous individual Gorillas workers with their disputes and/or disciplinary hearings. Such successes are significant and sometimes of immeasurable value to those affected. Secondly, and similarly, the works council acts as a significant resource and source of information for workers on a number of topics, including their workplace rights and how to access information. Such services are likely to be of use to many more workers than those who take up disputes with the employer. Thirdly, the work of the collective was reported to have led to many productive relationships with workers at other firms in the q-commerce and food delivery sector, including Flink and Lieferando. These linkages have helped those workers establish their own works councils. An associated workers' collective was also formed at Getir, although an effort to form a works council was defeated by management.[51] Fourthly, the work of the Gorillas workers' collective and others had created pressure in the industry for firms to adopt unlimited/permanent contracts, as opposed to the fixed-term contracts used by Gorillas. Finally, collective action by informal groupings of workers and the workers' collective had succeeded in making limited gains on specific issues, including overturning unfair terminations and the provision of winter equipment. Thus, despite the many challenges, q-commerce workers in Germany had made some progress in improving sectoral conditions through developing their associational forms of workplace power.

6. UK

A comparative European assessment by McKinsey finds the share of online groceries is largest in the UK (followed by France and the Netherlands).[52] Within this burgeoning marketplace, numerous q-commerce startups, such as Getir, Zapp and Jiffy, have sought to establish market share. Large legacy retailers have expanded into omnichannel retailing, and more established courier platforms, such as Uber Eats and Deliveroo, have diversified to capture some of the predicted growth. Subsequent consolidations and acquisitions have proven disruptive for workers. However, while there have been important union developments for courier and transportation platform workers, there are comparatively low levels of union activity specifically within q-commerce. The labour market and employment issues flagged in our companion policy study are complimented here by insights drawn from union organisers and industrial relations experts. Firstly, the broader industrial relations and platform work context are examined; secondly, union achievements as examples of both institutional and associational power are presented alongside the challenges associated with organising in the sector.

6.1 MAPPING THE INDUSTRIAL CONTEXT AND OVERVIEW OF PLATFORM WORK

Following a four-year period of growth, trade union membership within the UK stands at 23.1% – the lowest rate on record. Labour Force Survey data show that 76% of members are over 35 years old, 47% have been working for the same employer for ten years or more, and those working in larger workplaces are more likely to be unionised.[53] National systems of collective bargaining and labour regulation vary. Within the UK, there has been a “continuous erosion and weakening of collective bargaining”.[54] Agreements are predominantly decentralised and take place at the company or local level, and when compared with other European countries, coverage is low and decreasing.[55] National or industry agreements cover 21.4% of private-sector jobs in the UK.[56] Analysis of union density by sector shows that, amongst transportation workers, membership stands at 36.6%, while for retail workers it is 12.1%.[57]

Alongside this broader context of unionisation, platform work has been growing in the UK. In 2018, it was estimated that 13% of the workforce were engaged in some form of platform work, while around 6% worked more than ten hours per week on, or earned at least a quarter of their income from platforms.[58] The governing body for trade unions in the UK, the Trades Union Congress (TUC), reported that by 2021 this figure had risen to 14.7% undertaking weekly work for a platform (approximately 4.4 million people).[59] Similar to both the Spanish and German cases, the turnover of workers is high and most on-location platform workers tend to be male, young and using platform work as a means to top up their income.[60 61]

The need for improved regulatory standards to ensure platform workers are adequately supported by workplace protections and address the emergence of digital forms of management has been widely acknowledged.[6263] Assessment by the TUC highlights how those who are pseudo-self-employed typically struggle with problems of scheduling, inconsistent earnings, horizontal career trajectories and unreliable long-term prospects.[64] However, our companion policy study demonstrates that these issues also remain prevalent for q-commerce workers, regardless of their employment status. Industry experts described how changed funding arrangements, requiring firms to outline a “path to profitability”, may have further detrimental consequences for workers. The workers we spoke with in the UK confirmed that cost-cutting is becoming synonymous with increased casualisation and precarity. The Taylor Review of Modern Working Practices,[65] and the UK government’s subsequent response,[66] recognised the need to address the uncertainties associated with changing labour markets. However, a regulatory response has not been forthcoming. In addition, the power imbalance and lack of agency workers face was notably missing from the review.[67]

6.2 UNION ORGANISING: ACHIEVEMENTS AND CHALLENGES

Within this broader context, we turn now to consider developments for platform workers and the challenges unions face in attempting to organise those in q-commerce. Mick Rix, National Officer for the GMB union, rejects the assumption of poor employment protections, asserting: "Gig and platform work doesn't have to be the Wild West of worker rights". However, union organisation specifically targeted at q-commerce workers is relatively undeveloped. As such, what follows is an analysis of achievements and challenges that have implications for these workers.

There are a variety of both mainstream (i.e. GMB, the Union of Shop, Distributive and Allied Workers (USDAW) and Unite the Union) and grassroots unions and worker organisations organising platform workers (Independent Workers' Union of Great Britain (IWGB) and the Workers Union). Legal challenge has been an important form of opposition. The case of *Uber BV & Ors. versus Aslam & Ors* illustrates how workers have been able to express institutional power through the courts. The case concerned worker status and ultimately held that drivers on the Uber platform are workers, entitled to the minimum wage and working-time protections. For gig economy workers who are not directly employed, the case paves the way for them to make a similar challenge.

Nevertheless, while case law such as this has important implications for the broader gig economy, both workers and experts highlighted that legal victories, derived rights and employment protections still need enforcing. The ability for workers to access institutional power is limited by the low levels of union membership described, the costs and lengthy timescales associated with pursuing a claim, and the lack of compliance by firms once judgements have been reached. Section 3 in our companion policy study is illustrative in this regard. Interviewees described how contracts and working arrangements had been reconfigured to avoid legal responsibilities,[68] and where employment protections were simply not honoured.

"The ability for workers to access institutional power is limited by the low levels of union membership described, the costs and lengthy timescales associated with pursuing a claim, and the lack of compliance by firms once judgements have been reached."

The Uber outcome was also significant in terms of the union organisation that followed. The case was supported by the GMB union, who subsequently signed a collective-bargaining agreement with Uber. More recently, they have also agreed a voluntary recognition agreement with Deliveroo. The agreement covers q-commerce workers for Deliveroo Hop: both those directly employed as pickers and self-employed riders. This voluntary agreement includes representative systems, annual pay negotiations and commitments regarding health and safety and diversity and inclusion. The IWGB has been critical of this "*backroom deal*", claiming it undermines workers' interests, particularly in terms of employment status.[69] Within the agreement, workers are categorised as self-employed, a position the IWGB opposes. However, GMB takes the opposite approach, highlighting how members are keen to maintain their independence and freedom around the choice of if and when to work. GMB's Rix acknowledged that these "agreements are not perfect [and that] they will change". However, Rix asserts that for transport and delivery platform workers they are vital in providing a starting point from which to build better standards. Given the expansion of both Uber and Deliveroo into q-commerce, these agreements may prove relevant for these workers.

In addition to these developments, unions are well versed in campaigning around the variety of issues q-commerce workers face. In the context of these recognition agreements, efforts to build associational power through organising campaigns concerning "toilet dignity"[70] for delivery workers, pick rates[71] for instore workers, and health and safety on the road[72] for couriers may prove fruitful.[73]

Beyond these examples of union organisation and campaigns, there was also some evidence of self-organising, as in the German case, described during interviews. Workers explained how they had set up a forum during a TUPE process.[74] The purpose of the forum was to raise collective concerns with management. However, once the firm had been acquired and the new employer was in place, the forum dissipated. Another worker, and union member in his substantive post, described how he had encouraged colleagues to leverage their collective associational power in response to management changes to the rider bonus scheme. Perceiving the new targets to be dangerous, the interviewee urged his co-workers to respond by slowing down, rather than speeding up. However, he also acknowledged the futility of his suggestion, given the lack of collective interest amongst his colleagues.

In marked contrast to these limited developments, Amazon warehouse staff are currently in dispute with management. This has prompted the first official industrial action amongst their workers in the UK.[75] While their concerns are markedly similar to those working in q-commerce – relating to pay, the high-pressure environment, and monitoring and management by algorithm – the size of their workplace is notably very different. Given the union member profile described above, this is indicative of the challenges associated with recruiting and organising platform workers, including those in the q-commerce sector.[76][77] Factors such as the rapid turnover of workers, typical age and motivation of those working in the sector require unions to adopt new strategies.

In response to these challenges, and as already highlighted with reference to the Deliveroo agreement, traditional (GMB) and grassroots (IWGB) unions differ in their approach to organising.[78][79][80] Comparative research has shown how traditional unions typically use a more workplace-focussed approach, whereas grassroots unions focus on a geographical area, and so, are potentially better able to organise across different platforms.[81] Rix (GMB) recognised how traditional unions needed to shift their emphasis beyond branch and regional union structures. He commented, "as a union we need to think about how we operate on the ground… transcending regional boundaries".

The rapid turnover of workers and the tendency to work across multiple platforms underlines the need to rethink union membership systems and branch structures. The research has consistently shown that platform work is commonly used to top up income, with workers operating across multiple platforms.[82][83] This finding was confirmed during the qualitative phase of the research by both workers and union leaders. This demonstrates how employment has become less fixed and highlights the need for unions to re-categorise union membership as belonging to the individual and not the job. Joyce et al. describe the importance of "imaginative building of associational power through linking workers across companies and across sectors".[84] By leveraging a culture of solidarity amongst those in different firms, the location of work and size of workplace are rendered less important. UK unions are seemingly on the cusp of making inroads into this sector. However, finding ways to offset the challenges described is critical to this expansion.

7. CONCLUSION

Building on the findings of a companion policy study into the business dynamics and working patterns in the European q-commerce sector, this policy study examines the patterns of and prospects for trade union organising in q-commerce. Despite the economic turbulence in the sector and prevalence of mergers and acquisitions, it seems likely that some form of rapid delivery will persist over the medium to long term. Furthermore, the prevalence of poor and deteriorating working conditions in q-commerce is increasingly leading workers organically towards forms of collective action, which unions can build upon. As such, unions could benefit from paying close attention to both business trends in the sector and efforts at organising q-commerce workers.

The vulnerabilities of the just-in-time model, combined with the large outlay on capital assets and the dense spatial concentration of workers inside and outside of dark stores, collectively give q-commerce workers the ability to shut down services with relative ease.

This policy study has developed a critical PRA to analyse the structural context in which workers and unions seeking to organise the sector are operating. Mapping the organisation of the sector, we show how, as on-demand logistics providers, q-commerce firms rely upon smooth flows of goods through supply chains, warehouses and onto final-mile delivery vehicles. The vulnerabilities of the just-in-time model, combined with the large outlay on capital assets and the dense spatial concentration of workers inside and outside of dark stores, collectively give q-commerce workers the ability to shut down services with relative ease (as demonstrated particularly well in the Spanish Glovo strikes). On the other hand, the weak business position both financially (dependence on increasingly fickle venture capital) and in relation to powerful wholesale suppliers limits the potential for q-commerce firms to absorb wage increases compared with traditional retailers. Furthermore, the widespread use of precarious and migrant labour makes recruitment by unions and worker organisations difficult, while there is evidence that some firms are highly resistant to efforts by workers to organise collectively. However, the deteriorating financial conditions in q-commerce are intimately linked to worsening working conditions – with the effect of driving workers to take action to improve their conditions (where structural conditions are ripe to do so).

With these conditions in mind, the policy study examined successes and failures at organising q-commerce workers across Europe, so far, by looking in detail at the Spanish, German and UK cases. Table 1 summarises these conditions and connects them to organising outcomes (associational power).

In Spain, the CC.OO, UGT and CGT have successfully begun to recruit and organise workers, with impressive successes in organising works councils in Catalonia, which have begun to make concrete gains for workers. Crucial to this is the institutional environment (with a centre-left government dedicated to improving conditions in the sector), an industrial relations system that favours collective bargaining and a grassroots body of organised workers moving between other parts of the platform economy prepared to take semi-autonomous collective action. In this environment, it is possible for unions to build on workers' associational power to form works councils able to challenge poor employment practices, in turn, recruiting workers to unions and building structural power, which is likely to persist. In Germany, workers in q-commerce are predominantly organised through autonomous actions from riders' collectives, which managed to organise industrial actions and set up works councils. They did so while confronting several legal and managerial obstacles, and with traditional unions facing difficulties in organising workers in the sector. As such, associational power is yet to be consolidated into durable forms of structural or institutional power. Nevertheless, autonomous worker collectives have achieved impressive organisational feats. In the UK case, an industrial relations system characterised by decentralisation, company-level bargaining and weak rights for workers poses challenges for workers and unions. Workers themselves had not mounted any autonomous collective actions of note. Moreover, union officials interviewed – even those working in analogous parts of the platform economy – showed little sign of having attempted to recruit or organise specifically amongst q-commerce workers. Instead, unions have focused on improving institutional power by mounting legal battles with platform employers around the issue of self-employment – an issue that has little impact on q-commerce work. Despite this, workers interviewed showed significant signs of dissatisfaction with work. They were eager to communicate these with researchers, indicating that the field is open for unions with time and resources to begin recruiting in this area, even if collective action is not immediately forthcoming.

> *The high turnover of workers represents a major barrier to organising across these cases.*

The high turnover of workers represents a major barrier to organising across these cases. Sectoral and local initiatives (as in the cross-pollination of worker and rider collectives across firms in Berlin, for example) could help ensure workers leaving one firm and joining another can remain active trade unionists. Institutionally, one major goal for worker and union campaigns is likely to be pushing for inclusion of q-commerce workers within existing sectoral collective agreements covering bricks-and-mortar retail. Doing so would diminish concerns about q-commerce platforms' ability to undermine existing conditions and pay in the industry, and ensure that workers enjoy quality terms and conditions despite high turnover. Less evident so far is the question of building societal power. Strategies for doing so may include engaging local authorities and neighbourhood groups (through concerns over dark stores permitting noisy congregations of riders outside), NGOs focused on algorithmic transparency issues (targeting the work intensification embedded in the automated management systems being used) and campaigns against low pay. Such tactics could draw on q-commerce firms' commitments to good employment practices to highlight areas in which these commitments are, in reality, not being met.

Q-commerce is an incipient industry. As such, organising efforts are also at a very early stage, and it remains to be seen whether unions will successfully be able to navigate the challenges of recruiting and establishing adequate formal bargaining arrangements in this new sector. The experiences catalogued in this policy study demonstrate that poor and deteriorating conditions in the sector – intimately linked to the business strategies of firms to build "pathways to profitability" by both degrading and intensifying working conditions – are leading workers organically toward forms of collective action *where structural conditions are ripe for them to do so*. Furthermore, industry characteristics (large quantities of fixed capital investment, substantial face-to-face contact and a tendency toward formal employment contracts) all lend themselves to more durable forms of worker organisation than are likely to be possible in many other parts of the platform economy. To ensure durable reform in the sector, unions must build on this firm terrain and upon workers' increasing preparedness and desire to improve their conditions.

TABLE 1: A SUMMARY OF THE DIFFERENT POWER RESOURCES IN SPAIN, GERMANY AND THE UK

	Structural power	Institutional power	Worker/union strategies	Associational power
Spain	• Two dominant q-commerce platforms: Glovo & Getir • On-demand and just-in-time; concentration of riders and pickers; mainly employment contracts (though use of agency workers) • Many migrant workers (but from Spanish-speaking South America); high turnover; short-term contracts	• Widespread collective-bargaining coverage • Statutory right for works councils to collectively bargain and negotiate over terms • Riders' law (2021) enforced presumption of employee status for many platform workers	• Building on semi-autonomous riders' groups (CGT, CC.OO) organising work • Connecting with pre-existing platform work struggles (Glovo food delivery) • Aggressive action (sustained strikes, blocking depots) combined with building durable institutions • Offering service centres for riders to congregate	• Grassroots collectives (affiliated to union confederations) began organising in major cities • Grassroots action fed through into recruitment strategy by major unions • Footholds in other parts of platform economy (Glovo food delivery) leveraged to build in q-commerce • Durable trade union structures engaged in regular negotiations with management in the cities where they are organised
Germany	• Flink, Gorillas and Getir are the dominant platforms • On-demand and just-in-time; concentration of riders and pickers; mainly employment contracts • Many migrant workers; high turnover; short-term contracts	• Widespread collective-bargaining coverage • Statutory right for works councils to negotiate working conditions (but not pay) • Strict regulatory framework for platform economy	• Led by grassroots unions/workers' collectives. • Successful establishment of works councils at Gorillas and Getir • Failure of established unions to make inroads	• New highly motivated autonomous workers' collectives organised strikes and protests • Working as service centres helped recruit members to collectives • Failure to transform autonomous action into durable trade unionism
UK	• Gorillas, Getir and GoPuff are major players • On-demand and just-in-time; concentration of riders and pickers; mainly employment contracts, though evidence of increasing precarity and casualisation • Many migrant workers; high turnover; zero-hours contracts	• No tradition of works councils • Low collective-bargaining coverage • Employer-dominated industrial relations system • Few restrictions on platforms (though some litigation successes, e.g., Uber)	• Little evidence of either grassroots or traditional union organising	• N/A

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END NOTES

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ABOUT THE AUTHORS

Dr Steve Rolf

Dr Steve Rolf is ESRC Research Fellow at the Digital Futures at Work (Digit) Research Centre, University of Sussex. He is a political economist researching the digitalisation of work, the rise of platforms, and their regulatory and geographical consequences. He has published widely on topics related to these fields, and is currently working on a monograph examining the rise of platforms in the context of the long-run global economic slowdown.

Dr Wil Hunt

Dr Wil Hunt is a Lecturer in Organisational Behaviour and a Researcher at the Digital Futures at Work Research Centre (Digit) at the University of Sussex. He has published research on a range of work and employment related topics. His current research focuses on the use of new digital technologies and the implications for work and workers.

Dr Rachel Verdin

Dr Rachel Verdin is a research fellow based at the Digital Futures at Work Research Centre. She is currently examining the extent of digitalisation and the impacts on work and welfare systems across Europe as part of the EUROSHIP project. Her research interests include social policy, gender, digital inequalities and the future of work. She joined the University of Sussex in 2017 as a Doctoral Researcher funded by the Business school. She spent the first part of her career working in the trade union movement, holding sole industrial responsibility for both public and private sector organisations.

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info@feps-europe.eu
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Rue Joseph II 40, 1000 Brussels, Belgium
www.uni-europa.org
@UNI_Europa

The retail industry has been reshaped by the rise of quick-commerce (q-commerce) platforms, which promise delivery of groceries often in under 30 minutes. This policy study examines q-commerce and its potential threats to established collective bargaining patterns and trade union strongholds in bricks-and-mortar retail. Based on desk research and in-depth qualitative interviews with experts, industry stakeholders, and q-commerce workers in Germany, Spain, and the UK, the study contextualizes the rise of q-commerce and considers how trade unions could react to its emergence. The study presents a critical power resources approach (PRA) framework to adjudicate the potential for organising in q-commerce, given the structure of the industry and its labour markets. The study's findings on the business dynamics, working conditions, and policy recommendations surrounding q-commerce are summarized. Despite turbulent business dynamics, some variants of q-commerce will likely continue, and unions should devote efforts and resources to organising q-commerce for the protection of workers and to ensure q-commerce firms do not undermine the conditions of those working in adjacent retail and logistics industries. The study maps the structural, associational, institutional, and societal power resources available to q-commerce workers and unions. It concludes by drawing together provisional lessons from the broader analysis and particular cases in Spain, Germany, and the UK, before suggesting a way forward.

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