



**COVID-19 IMPACT ON PLATFORM  
ECONOMY:  
A PRELIMINARY OUTLOOK**

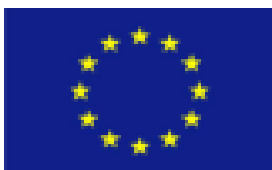
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**July 2020**

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<b>Instrument</b>	<b>Research and Innovation Action (RIA)</b>
<b>Topic</b>	<b>TRANSFORMATIONS – 01 - 2018</b>
<b>Call Identifier</b>	<b>H2020-SC6-TRANSFORMATIONS-2018</b>
<b>Grant Agreement</b>	<b>N. 822638</b>
<b>Project Acronym</b>	<b>PLUS</b>
<b>Project Full Title</b>	<b>Platform Labour in Urban Spaces: Fairness, Welfare, development</b>
<b>ISBN</b>	<b>9788854970311</b>
<b>DOI</b>	<b>10.6092/unibo/amsacta/6471</b>
<b>License</b>	<b>CC BY 4.0 International</b>

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*This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 822638. The European Commission support for the production of this publication does not constitute an endorsement of the contents which reflects the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained therein.*

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## 1. INTRODUCTION

PLUS project investigates the multiple effects of four digital platforms (Airbnb, Deliveroo, Helping and Uber) on work, social protections and everyday life in seven European cities (Barcelona, Berlin, Bologna, Lisbon, London, Paris and Tallinn). While focused on specific case-studies, the project aims to investigate ongoing transformations in a larger perspective, considering platform economy as a testing ground for a more general redefinition of industrial relations, productive processes and social wellness challenges.

With different degrees of diffusion and seriousness, Covid-19 pandemic spread all around Europe (and beyond) with a direct impact on the research field we are pursuing within the PLUS project. Generally, as researchers registered a general and remarkable growth for services digitalisation, where platforms represent a leading business model. Nevertheless, such push cannot be generalized to all kind of services, but we may report a split. On one hand, platforms like Airbnb, Uber or Helping experienced a sudden breakdown due to pandemic related restrictions in place in most European countries, on the other hand platforms like Deliveroo suddenly experienced an unexpected relevance, so much so that *riders* have become “essential workers” both in mainstream media and political narrative. Furthermore, PLUS targets urban spaces as fundamental dimensions for platforms development and policy regulation. Urban life has been affected by lockdown measures with empty streets and few workers guaranteeing social reproduction services. Thus, *labour digitalisation* and *urban approach* represent PLUS features that appear very useful to frame Covid-19 impact. With the aim to sketch a picture on the overall situation of the seven cities, PLUS consortium decided to write this report discussing measures adopted at local level to face the emergency and exploring potential outlooks for next months.

With this report, PLUS consortium wants to contribute to a large debate on the role of platform economy and on how to deal with labour transformations after Covid-19 outbreak. Considering the ongoing very unpredictable situation, the observations contained in the report should be considered as explorative to further investigations. In any case, we would suggest to avoid framing Covid-19 outbreak in 2020 as outstanding event clearly dividing what occurred before from what will occur shortly after. Rather, one of the purposes of this report is to test if some of the hypothesis we produced during the first year and half of the project are still persuasive even after virus appearance. At first sight it seems that Covid-19 pandemic highlights and, if anything, emphasizes very well some platforms characteristics we had already identified: the lack of social protections for platform workers, the becoming essential infrastructures of platforms, the digitalization of services, the changing nature of urban economies.

The report tries to answer to a grid of several common questions for every city, in order to depict a comparable analysis of the overall situation. Firstly, we will frame the “*platform economy urban background*” in order to present the general conditions in every city before Covid-19 breakthrough. This section will take advantage from the investigation that all PLUS partners already did in the previous months. Secondly, we will describe the “*Covid-19 impact*” in each country and the measures implemented by institutions. Due to the courses of infections, government and sometimes local measures have been heterogenous and

calibrated case by case, so that it is crucial to be aware of the variety of local conditions. Thirdly, we will focus on *“platforms reaction”*. As stated above, platforms suffered from the pandemic impact in very different manners. Furthermore, same platform reacted differently according to the city. Thus, this section aims to depict an in-depth snapshot of each PLUS city. Eventually, fourth section is centred on *“looking forward”* to potential scenarios opened up by the pandemic and containment measures. It will implement hypotheses on how platform economy will change in each city during the next months and years, which new structural features concerning *“platforms worlds”* Covid-19 impact disclosed, which public debates are following the pandemic crisis, and beyond. Finally, we will sketch some conclusions both to underline differences and commonalities between case studies, and to hypothesize some general tendencies.

## 2. BARCELONA

Authors: Ricard Espelt, Melissa Renau Cano (Open University of Catalonia)

### 2.1 Platform economy urban background

The platform economy in the city of Barcelona in general, and platform labour specifically, is a phenomenon of interest and great repercussion. Indeed, Spain is one of the European countries in which more people have used platforms as an income source.

Although short-term rental platforms is an activity regulated by the regional government - Generalitat de Catalunya- the city council is in charge of expediting new licenses, which are paused until further notice. In this sense, the City Council, before coronavirus outbreak, was waiting for the regional government to issue a new regulation that would make possible to distinguish among city zones, thus allowing to redirect mass tourism to less touristic' city neighborhoods.

Regarding platform workers' working conditions and possible modifications, it has to be taken into account that labour law competences depend on the national government. In this regard, the different platform economy stakeholders have very different opinions.

At the same time, that platform labour has created plenty of challenges it represents a good opportunity to promote sharing-oriented practices. Barcelona has a long and strong trajectory in promoting non-capitalist alternatives. It is noteworthy to indicate that Social and Solidarity Economy represents the 7% of the city' GDP. Indeed, Barcelona has been a place for the creation of an alternative platform cooperative to extractive platforms such as Deliveroo, Glovo, Uber Eats, etc.

Although most competences fall to regional and national governments Barcelona's city council is adopting some measures to prevent the city from receiving harsh negative externalities. The Barcelona City Council -led by the Commissioner of Social Economy, Social Development and Consumption- has been working in understanding the phenomenon, developing regulatory frameworks and educational material, sectoral policies and promoting local initiatives. For instance, the Barcelona City Council has promoted the publication of a digital platform workers guidebook.

### 2.2 Covid impact and institutional measures

The first Covid-19 case detected in Spain was on the 31st of January. However, it wasn't until the 21st of March that the state of alarm was declared. This bill made the minister of health be in charge of almost all the competences of the state. From that moment on Spain started a lockdown period very strict until the end of May when measures started to be softened.



Until the 11th of June, 242.280 cases were detected and 27.136 people died according to official statistics. Madrid and Catalonia are the main focuses of the epidemic. Barcelona is one of the most impacted cities. Barcelona's Municipal Data Office (OMD) analyzed the impact of coronavirus through a survey carried out to 3.600 people. The results show that 86% of the participants are quite worried or very worried with regard to the impact on the economy. Regarding working conditions, the 47% of salaried workers and 86.1% of self-employed workers believe the crisis will have a negative impact on their work. In addition, the OMD has created a web with the indicators and data of COVID-19 impact mixing its own data with data from other institutions. According to this data, the number of cases in Barcelona on the 7th of June would be 14.920 and in Catalonia of 57.531.

The Covid-19 has heavily impacted the Spanish economy highly dependent on tourism, The Bank of Spain projects a slump between the 9% and 11.6% of gross domestic product (GDP) for 2020. This one-year contraction of the economy would be equivalent to the one entire Great Recession when it slumped 9.5% over the course of six years .

The Spanish government who has promoted several measures to mitigate COVID-19 impact also recently announced -The Minister of Labor, Yolanda Díaz- its willingness to bring a bill to the Council of Ministers to prevent false self-employed on digital platforms such as Glovo and Deliveroo before August. This announcement has caused different reactions among platform couriers with supporters and non-supporters -who plan on organizing protests and actions in the coming weeks.

## **2.3 Platforms reaction**

Since the beginning of the lockdown platform couriers kept working since they were considered basic services. However, some of the platform couriers that we have interviewed explained that they had decided to stop working because they were worried for the COVID-19 possible impacts on their health and their nearest social circle and additionally, the gains had decreased a lot so some of them considered it was not profitable.

Deliveroo has changed considerably its organization. Specifically, the previously public requirements made to platform couriers such as pre-booking timetables, having to work on high-demand hours, not booking more than 40 hours per week, among others were removed. Platform couriers are now able to join wherever they want to, for as much as they want to. Nonetheless, these changes had also happened in other cities before COVID-19 but smaller than Barcelona. In this regard, the platform couriers interviewed for WP2 celebrate some of these changes, but complain about a considerable reduction on the number of deliveries, thus income, that provokes them to work a lot of hours if they want to earn an acceptable amount.

Airbnb has collapsed in Spain. According to a study developed by Transparent Airbnb the difference in reservations in Spain reached in April a 98% decrease . Airbnb had just lifted a round of financing that covers the total amount of income that expects to lose in the first half of 2020, 1.000 millions of dollars. Nevertheless, the company's IPO planned to be in 2020 has been postponed.

The impacts transcend Airbnb's company, the biggest European call center of Airbnb located in Spain announced in May a downsizing plan that affected almost 1000 employees and dismissal of the 25% of its worldwide workforce. However, not all the impacts are negative, 5,000 more rental apartments published in the traditional renting market (37% more than a year ago) in Barcelona. Finally, Airbnb has encouraged hosts to offer for free their apartments to health workers, although in case of charging them Airbnb has promised to not charge a commission for using the platform.

## **2.4 Looking forward**

Covid-19 outbreak has brought to the public debate issues surrounding social protection and work-life-balance. Although at the beginning some food delivery platforms suffered a plump on their income, during the next weeks of the lockdown they have increased their influence. The number of restaurants joining these types of platforms has increased. Moreover, it is probable that due to harsh economic conditions more people look for job alternatives such as delivery. This makes the Spanish government bill an even more urgent measure than before. However, its characteristics remain known to us and some platform couriers - in favor of self-employment recognitions- feel abandoned on the public consultation process, thus we may see an upsurge of mobilizations and actions in the coming months.

Airbnb has been dramatically impacted by the COVID-19 situation, and this forces its model to an important redefinition. It may be the case that we experience an increase in rentals on the long-term market (in case of Barcelona has increased the 37%). However, it still remains to be seen the impact of COVID-19, thus the increase in the supply of rentals in the traditional market could be something temporary. In any case, the lack of social protection of platform workers makes them highly vulnerable to this crisis.

### 3. BERLIN

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#### 3.1 Platform economy urban background

Berlin is an important center of Europe's platform economy. Firms like Rocket Internet (Helping, Zalando), Delivery Hero (Foodora) or Soundcloud have their headquarters in the city. For Airbnb, Berlin has become an important market due to the city's large tourism sector. Uber is present in the city but has been facing issues due to Germany's taxi market regulation, which limits its scope and earnings in the city. Berlin is also a strategic hub for other tech firms such as Amazon and Google, who have aimed at building large-scale offices in the city. Besides this, Berlin has also seen various forms of worker organizing and citizen protest against platform companies. This has influenced the city's regulatory policies in the last years. This mixture of development makes Berlin an important city for the research aimed at with PLUS.

#### 3.2 Covid impact and institutional measures

Starting on March 23<sup>rd</sup>, public life became severely restricted due to the pandemic and was limited to most basic services. Stay-at-home rules were announced. More severe measures were taken in April in selected regions of the country. However, no strict lockdown (as compared to Italy or Spain) had been announced or imposed at any time. International travel was heavily restricted, even for neighbouring countries until mid-June. In comparison with other countries, the death rate in Germany turned out to be relatively low. As of June 18<sup>th</sup>, roughly three months after the outbreak, 8869 individuals had died from the virus (from a population of 83 million)<sup>1</sup>. Around 190.000 infections were detected at this time. However, local outbreaks have been registered since. According to estimates, Germany's economic output will decline by around 6,8 percent.<sup>2</sup> According to figures of the *Bundesagentur für Arbeit*, individuals without German citizenship and with low or no educational degrees were significantly more affected by layoffs.<sup>3</sup> In Berlin, the restrictions on public life and international travel have been more visible than in most other regions of the country, as the tourism industry and local gastronomy has reached a low point. Compared to all German regions,

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<sup>1</sup> COVID-19 Dashboard by the Center for Systems Science and Engineering (CSSE) at Johns Hopkins University (JHU) <https://www.arcgis.com/apps/opsdashboard/index.html#/bda7594740fd40299423467b48e9ecf6> (18.06.2020)

<sup>2</sup> Institut für Weltwirtschaft, Kiel: <https://www.ifw-kiel.de/de/publikationen/medieninformationen/2020/ifw-konjunkturprognose-erholung-erfolgt-nur-langsam/> (18.06.2020)

<sup>3</sup> Bundesagentur für Arbeit, Nürnberg: <https://statistik.arbeitsagentur.de/Statistikdaten/Detail/202005/arbeitsmarktberichte/am-kompakt-corona/am-kompakt-corona-d-0-202005-pdf.pdf> (23.06.2020)

Berlin's economy has been hit the hardest: the unemployment rate rose by 2.4% to a total of 10 % by June 2020.

The German federal government as well as regional governments implemented quick measures to attenuate the economic threat of the crisis. The federal government announced a 40-billion economic stimulation package for small businesses and freelancers. Individuals who create revenue through renting out apartments were explicitly excluded from eligibility. In Berlin (and similarly in other regions), regional help for freelancers made it possible to qualify for a one-time payment of 5.000 EUR in March and April. Germany also lowered the barriers for companies to implement 'Kurzarbeit', a system which has gained prominence in 2009 and which ensures employment status for workers during a crisis situation (up until 12 months long) and a pay of 60% during this time. In April alone, Kurzarbeit applications were filed for 8 million people, which is seven times higher than at the peak of the financial crisis in Germany (1.4 million people). In general, all prominent stimulus measures were limited to the formal economy, which implies that workers in the domestic and informal sector have been affected more severely by the crisis.

### 3.3 Platforms reaction

According to estimates, Uber traffic decreased by 80 percent in the first weeks of the pandemic<sup>4</sup>. Uber drivers, who are obliged to have contracts with sub-contractor companies in Germany, were either laid off or saw their workday prolonged to ensure enough rides could be made. Local regulation obliges drivers and sub-companies to ensure health safety measures, specifically plastic shields between drivers and customers. During the fieldwork, most interviewed drivers deemed these measures insufficient. In June, Uber introduced bonus programmes (fare reductions of 50%) to re-stimulate traffic in the city.

Like in other cities, the short-term rental economy came to an almost complete halt at the beginning of the crisis. This was linked to the hygiene regulations, but more importantly to the stark decline of tourism and because local regulation has prohibited touristic short-term rentals until May 24<sup>th</sup>, 2020.<sup>5</sup> Airbnb offered compensation for hosts in special cases, but the overall costs were covered by hosts. The company also encouraged hosts to offer premises to health care workers free of charge. According to reports, many hosts have shifted to offer their living space more permanently, on a month-to-month basis.<sup>6</sup> However, since domestic tourism is allowed again, bookings appear to return to the platform to some extent.<sup>7</sup>

According to interviews conducted during the crisis, orders on Helping in Berlin declined by around 50 percent in the first weeks after the pandemic had started. The company has introduced some security measures, and offered workers to cancel bookings for safety

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<sup>4</sup> Estimate is based on an interview with an Uber representative in Berlin.

<sup>5</sup> [https://www.rbb24.de/panorama/thema/2020/coronavirus/beitraege\\_neu/2020/05/corona-lockerungen-25-mai-hotels-pensionen-camping-urlaub-regeln-berlin-brandenburg.html](https://www.rbb24.de/panorama/thema/2020/coronavirus/beitraege_neu/2020/05/corona-lockerungen-25-mai-hotels-pensionen-camping-urlaub-regeln-berlin-brandenburg.html)

<sup>6</sup> <https://www.heise.de/ct/artikel/Ausgangsbeschaenkungen-setzen-Airbnb-unter-Druck-4723598.html>

<sup>7</sup> <https://www.handelsblatt.com/unternehmen/dienstleister/tourismus-plattform-airbnb-erholt-sich-der-boersengang-des-jahres-scheint-wieder-moeglich-/25906474.html>

reasons without sanctions. When masks became mandatory, the company attempted to sell masks to workers instead of handing them out, a measure that was taken back after workers and activists announced to organize next to the stand and give out free masks.

Although Deliveroo does not exist in the city anymore, it can be said that the city's main delivery platform Lieferando has been working throughout the crisis. While the company has added more partnering restaurants, customer demand was varying since the start of the pandemic.

### **3.4 Looking forward**

The Covid-19 pandemic in Berlin (and likely in other cities) appears to show the characteristics of the PLUS platforms very well: although most of the companies are economically affected by this crisis, their marketplace infrastructure gives them the opportunity to scale up or down their workforce according to the situation, and to leave the main responsibilities and risks (property rent, maintenance costs, loss of income) to their workers. In this sense, the platform business model proves a successful scheme for profit in the crisis. At the same time, the situation has also made the vulnerability of platform workers more obvious to the general public and might induce repercussions on a regulative level. Cities and municipalities might use the crisis to refigure their relationship with platform corporations (e.g. to regulate the housing market), although this remains to be seen.

The crisis clearly highlights the issue of welfare and social protection. In the crisis, platform workers rely on themselves or on public benefits. Although thousands of workers in Berlin generate revenue for Uber, Helpling and (to some extent) Airbnb and can be disciplined in their labor process by the companies, they stay out of the country's welfare system for the most part. Workplace protection for workers has been kept at a relative minimum on all PLUS platforms in Berlin, and is likely to continue this way.

The overall development of the PLUS companies in Berlin is obviously tied to the pandemic-related measures in Germany and Berlin. As of June 2020, most signs indicate a recovery from the exceptional state that has been in place in March, April and May. If this will be the case, there is little indication that the PLUS platforms (even Airbnb) will change their mode of operating.

## 4. BOLOGNA

Authors: Federico Chicchi, Mattia Frapporti, Marco Marrone, Maurilio Pirone (University of Bologna)

### 4.1 Platform economy urban background

Despite their many differences, we have some common features which may help in positioning digital platform in Bologna's context. Firstly, platform economy has rapidly grown in Bologna, especially for what concerns food delivery and short-term rentals, having several active platforms. However, this is not the case of Uber which, due to national legal framework, can't operate on the Italian context, and of Hepling, which seems to suffer the competition of the traditional informal economy. Secondly, the rise of platforms such as Deliveroo and Airbnb seems to have been facilitated (and influenced) by both long term and recent transformation, but also by the specificities of Bologna's urban landscape: during last years, the city registered an increasing tendency by economic actors to avoid the effect of formal regulation (i.e. in terms of short-term hosts registration), but also the impact of the tourism expansion so to label Bologna as the Italian "city of food". All in all, we can say that, while platforms are successfully operating in Bologna's urban market, they lack of redistributing such benefits, increasing precarity and inequality among their workers, but also effecting traditional urban actors and the rest of the city. Nevertheless, the city registered also the attempt of local administration to regulate labour through digital platforms, approving the Chart for Digital Workers' Rights in Urban Context.

### 4.2 Covid impact and institutional measures

Covid-19 outbreak in Italy basically meant the outbreak of Coronavirus crisis in the whole Europe. First cases have been reported at the end of January, but probably the virus circulated before. Generally, the country registered a high number of infections, especially in the North of Italy. Until the 4<sup>th</sup> of June, 234.013 cases of contagion and 33.689 deaths have been officially confirmed even if the number is probably much higher<sup>8</sup>. Bologna didn't have been affected too much but nevertheless suffered the surroundings situation.

Government rapidly adopted several measures<sup>9</sup> of social distancing, with the progressive suspension of many activities (schools, restaurants, office working, public events) in the Northern regions. Since the 4<sup>th</sup> of March, these measures are progressively extended to all the

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<sup>8</sup> Ashleigh R Tuite, Victoria Ng, Erin Rees, David Fisman, *Estimation of COVID-19 outbreak size in Italy*, «Lancet», Volume 20, Issue 5, May 2020, available here: [https://www.thelancet.com/journals/laninf/article/PIIS1473-3099\(20\)30227-9/fulltext](https://www.thelancet.com/journals/laninf/article/PIIS1473-3099(20)30227-9/fulltext)

<sup>9</sup> Andrea Saglietto, Fabrizio D'Ascenzo, Giuseppe Biondi Zoccai, Gaetano Maria De Ferrari, *COVID-19 in Europe: the Italian lesson*, «Lancet», Volume 395, Issue 10230, April 2020, available here: [https://www.thelancet.com/journals/lancet/article/PIIS0140-6736\(20\)30690-5/fulltext](https://www.thelancet.com/journals/lancet/article/PIIS0140-6736(20)30690-5/fulltext)

country, forbidding the mobility through regions. Prime Minister's Decree of the 22<sup>nd</sup> of March (so-called "Chiudi Italia" – "Close Italy") declared suspended all the productive activities but confirming essential services like the long and short-range logistics as "essential activities".

Several economic measures of public support to standard workers and industry sector have been adopted as well as some emergency benefits for autonomous workers but no measures for casual workers – and many platform workers could be listed in such group. Some protests have been registered<sup>10</sup> in logistics and industry as workers complained the lack of PPE and fear of infection. Furthermore, it has been reported how many factories – especially in the North of Italy, never suspended production. Re-opening of some productive activities have progressively occurred since the 4<sup>th</sup> of May, while human mobility restrictions through regions ended the 3<sup>rd</sup> of June. Actually, there is an outlook of GDP decrease<sup>11</sup> around 10%, according to Bankitalia.

### **4.3 Platforms reaction**

In Bologna, as in the rest of Italian territory, food delivery platforms never suspended the service. All major firms declared a positive trend, after a first moment of difficulties: Uber Eats reported +55% of purchases worth<sup>12</sup> in April, while Deliveroo reported +40% of restaurants registered on the platform in March<sup>13</sup>. Furthermore, Deliveroo has enlarged its range to some "essential" products and supermarkets to gain some new market segments and raised the fees for the restaurants to 40% of the purchase. Nevertheless, on May 29 Uber Eats has been charged with illegal recruitment and workers harassment<sup>14</sup>.

Struggles promoted by informal riders' unions took place in several Italian cities such as in Bologna, and their protest gained new visibility in public debate. In the first moment, they requested to suspend the service and the introduction of a quarantine income; subsequently, they demanded for a regional regulation of food delivery services and better contractual conditions. According to Government welfare measures, VAT workers could obtain 600 euros of emergency benefit in April and May, but few riders are enrolled in this way. Deliveroo introduced a benefit for workers infected but only if they could prove this with an official

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<sup>10</sup> Into the Black Box and Officina Primo Maggio, *Strikes and invisible mobilizations in the Italian pandemic* (2020), in Workers Inquiry Network, *Struggle in a Pandemic: A Collection of Contributions on the Covid-19 crisis*, available here: <http://www.intotheblackbox.com/wp-content/uploads/2020/05/Struggle-in-a-Pandemic-FINAL.pdf>

<sup>11</sup> Davide Colombo and Carlo Marroni, Bankitalia: stima Pil in calo del 9,2% nel 2020, rimbalzo del 4,8% nel 2021, «Il Sole 24 Ore», 5 June 2020, available here: <https://www.ilsole24ore.com/art/bankitalia-stima-pil-calo-92percento-2020-rimbalzo-48percento-2021-ADlcvMv>

<sup>12</sup> Ansa, *Coronavirus: Uber Eats, +55% per le vendite nell'ultimo mese*, 9 April 2020, available here: [https://www.ansa.it/canale\\_terraegusto/notizie/a\\_tavola\\_con\\_ansa/2020/04/09/coronavirus-uber-eats-55-per-le-vendite-nellultimo-mese-Of8ff3f1-8111-4f14-9eb2-1966177bbe90.html](https://www.ansa.it/canale_terraegusto/notizie/a_tavola_con_ansa/2020/04/09/coronavirus-uber-eats-55-per-le-vendite-nellultimo-mese-Of8ff3f1-8111-4f14-9eb2-1966177bbe90.html)

<sup>13</sup> Alessandro Vinci, *Coronavirus, food delivery in sofferenza: il lockdown penalizza i big del settore, si salvano i piccoli*, «Corriere della Sera», 26 March 2020, available here: [https://www.corriere.it/tecnologia/cards/app-food-delivery-pronte-ripartire-il-grande-caos-meno-20percento-ordini-ma-ci-sono-segnali-ripresa/deliveroo.shtml?refresh\\_ce-cp](https://www.corriere.it/tecnologia/cards/app-food-delivery-pronte-ripartire-il-grande-caos-meno-20percento-ordini-ma-ci-sono-segnali-ripresa/deliveroo.shtml?refresh_ce-cp)

<sup>14</sup> Valerio De Stefano and Antonio Aloisi, *Are we Managers or Corporals?*, «Rivista Il Mulino», 5 June 2020, here available: [https://www.rivistailmulino.it/news/newsitem/index/Item/News:NEWS\\_ITEM:5256](https://www.rivistailmulino.it/news/newsitem/index/Item/News:NEWS_ITEM:5256)

diagnosis (not so easy because of swabs' scarcity). No PPE has been furnished to workers by platforms, apart from the ones by Riders Union Bologna – that obtained them from local administration.

Impact of Covid-19 on Airbnb was quite opposite. Tourism collapsed. From around 127.000 new booking in Italy at the beginning of February, the platform passed to around 42.000 at the end of March<sup>15</sup>. In Bologna rental activities saw at the 1<sup>st</sup> of March a cancellation rate “up to 90%” in that month<sup>16</sup>, that reached the 100% just few weeks later. Host of Local Pal – Bologna small hosts association – claimed support by municipality asking for cutting local taxes on reservation through platforms. Italian Government announced an “holiday bonus” that goes up to 500 euros to support the tourism sector, but it will not be valid for short term rental platforms, rising the protest of Airbnb Italian County Manager<sup>17</sup>.

Few information are available on Helpling. The platform kept working during the lockdown. Nevertheless, cleaning workers didn't receive many offers because of customers fear to be infected. As for Airbnb and Deliveroo, Helpling workers couldn't benefit from social welfare programs.

## 4.4 Looking forward

In general terms, we see the sector of platforms as one of the best positioned on the market after the pandemic. Digital services, data processing and last-mile logistics gained more influence. Nevertheless, we may highlight a split between commodities mobility and people mobility with platforms furnishing second typology of services in crisis.

While Deliveroo has a positive outlook for next months, Airbnb will go through a deep redefinition. Food delivery workers seem to be more publicly recognized as essential workers and this open up for a better recognition in terms of income and welfare. Nevertheless, companies do not seem in favor of a change in labour relations and contractual forms. At the same time, riders report new hirings in the sector, with workers previously engaged with other jobs changing their profession. On the other side, short term rentals could be directed towards a more stable market, from tourists to local dwellers. This will have undoubtedly an effect on all the tourism sector and the economic fabric of the city. Helpling workers can go back to work without mobility restrictions but have to respect protocols<sup>18</sup> and risk to face an

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<sup>15</sup> Data taken from Airdna: <https://www.airdna.co/covid-19-data-center>

<sup>16</sup> Bologna Today, *Coronavirus, gli host scrivono al sindaco dopo il crollo delle prenotazioni: "Sospendere la tassa di soggiorno"*, 1 March 2020, available here: <http://www.bolognatoday.it/economia/coronavirus-richiesta-sospensione-tassa-soggiorno-airbnb-.html>; Paola Dezza, *Affitti brevi nella morsa del coronavirus*, «Il Sole 24 Ore», 11 March 2020, available here: <https://www.ilsole24ore.com/art/affitti-brevi-morsa-coronavirus-AD0j5JC>

<sup>17</sup> Fabio Savelli, *Il bonus vacanze da 2,4 miliardi che esclude Booking.com ed Airbnb*, «Corriere della Sera», 14 May 2020, available here: [https://www.corriere.it/economia/consumi/20\\_maggio\\_14/bonus-vacanze-24-miliardi-che-esclude-bookingcom-ed-airbnb-77e0af12-95eb-11ea-b0dc-2b898cb19b15.shtml](https://www.corriere.it/economia/consumi/20_maggio_14/bonus-vacanze-24-miliardi-che-esclude-bookingcom-ed-airbnb-77e0af12-95eb-11ea-b0dc-2b898cb19b15.shtml)

<sup>18</sup> <https://www.helpling.it/coronavirus>



increasing flexibility of their job (with last time cancellations and less job offers). Furthermore, closed spaces have been addressed as the most dangerous in terms of infection potentialities. In all three cases, the lack of social protections and standard contracts will expose these workers in next month to great uncertainty.

Finally, it is possible that new platforms will emerge in next months especially around urban delivery with opportunities for public services or workers cooperatives.

## 5. LISBON

Authors: Giovanni Allegretti, Nuño Rodrigues, Michelangelo Secchi, Franco Tomassoni (Centre for Social Studies, University of Coimbra)

### 5.1 Platform economy urban background

The development of platform economy in Lisbon is deeply connected to the governmental strategy implemented to address the aftermath of the financial crisis exploded in Portugal in 2011. This strategy headed by the Portuguese government in cooperation with local administration of Lisbon relay on tourism, services and digitalization of the economy (Seixas et al. 2015). The objective of transforming Lisbon into a smart city, developed simultaneously with a process of “startup urbanization” (Carvalho and Vale 2018), are the main economical tendencies which nowadays encompassing Lisbon and its economic structure. This framework has shaped what is the real peculiarity of the Portuguese context, and that we call intermediary platform capitalism. With this expression we define a system of regulation of platforms through companies, mainly national (although this is not always the case), which deal with the intermediation between those who operate through the platform (uber drivers or Airbnb hosts) and the platform itself. Regarding the legal framework of Uber, the so called “lei da Uber”, a law that regulate the passengers transport through platforms such as Uber, introduced a third part, an intermediary enterprise between the platform and the worker which divides workers into different companies with different sizes, managerial strategies and types of contracts. Regarding Airbnb, the government’s strategy in collaboration with local administrative authorities has shaped a large market for short-term rentals, which has increased competition (Cocola-Gant 2019). Consequently, it reduced the number of small hosts of medium to large real estate owners and, fostered the emergence of an intermediary business sector for the management of short-term rentals through platforms.

Our preliminary conclusion is that this peculiar way of governance of platform economy has produced a weakening of social conflict and accelerated the tendency to strengthen business groups capable of exerting more pressure on local administrative levels.

### 5.2 Covid impact and institutional measures

The first two confirmed cases of COVID-19 in Portugal occurred on March 2. On March 18, the date of the declaration of State of Emergency in Portugal, there were 642 cases and 2 deaths. The initial duration of the State of Emergency was 15 days, the limit for the validity of this type of decree in the Portuguese constitutional system. This State of Emergency was renewed twice and ended on 2 May 2020. The President (in agreement with the Government and the Parliament) considered the declaration as absolutely indispensable to allow public authorities to impose measures needed for public safety but which limit basic liberties (as quarantine and all forms of forced confinement and restrictions to the freedom of movement) as well as the free enjoyment of private property rights (as in the case of measures that could require

redirection and conversion of production by part of private-owned firms, or the temporary transfer of healthcare workers from the private hospitals and clinics to the public sector).

In Portugal, as of 9-06-2020, a total of 35,306 cases was registered, with 21,339 persons reported as recovered, and 12,475 active cases (with 394 internal and 65 in intensive care). The number of deaths officially registered until that date was 1492. The evolution of the disease was geographically differentiated in the country, with the municipality of Lisbon being the one with most identified cases. However, in regional terms, the metropolitan area of Lisbon was the second in terms of highest number of confirmed cases (after the Northern region [Região Norte]).

The adoption of sanitary containment measures occurred with a gradual step-to-step trend, albeit many changes happened quite abruptly in the days leading up to the declaration of “state of emergency”. The starting measures - during the second week of March - included restrictions to the number of customers per square meter in commercial establishments or public spaces; the, quickly, a decree closed schools on March 16, while the state of emergency was declared on March 18. Social distancing has become the norm of any social relation, in particular during the state of emergency period – making confinement mandatory, except for indispensable activities of working sectors that could not take place on a teleworking basis. Among the acceptable reasons for skipping restrictions to movement, there were the need to help family members or going shopping to satisfy basic needs (supermarket and pharmacy), but also some forms of solidarity that could benefit vulnerable persons were recognized as justified exceptions to the lockdown rules. No need of filling written declarations in these cases was imposed: public transportation systems continued to work, although with stiffer rules for protection of workers and customers. Several economic sectors and many spaces open to the public have been closed, and the air-links with other countries were dramatically reduced, allowing only to certain type of travellers to move into (and out of) the country. Group events as music and cinema festivals have been prohibited until the end of September. Several universities decided to finish the 2019-2020 season through online supports for lectures, exams and theses’ sessions etc., suspending all face-to-face activities until the next academic year.

The social and economic effects of confinement have led the Portuguese State to adopt various measures to stimulate the economy (including tourism<sup>19</sup>) and to maintain employment and income, even if insufficiently and unadjusted to the current state of the labour market<sup>20</sup>. The adoption of the lay-off, implying a 1/3 pay cut, was extended to nearly 1.3 million workers. By 4 May 2020, 314,000 requests for support were made by self-employed workers (maximum support of €438.81 per month up to 6 months). More than 115,000 people applied for unemployment benefits by mid-May 2020<sup>21</sup>. These figures do not include the majority of informal workers or workers in the gig economy.

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<sup>19</sup> <http://www.turismodeportugal.pt/pt/Noticias/Paginas/turismo-de-portugal-lanca-medidas-apoio-setor.aspx>

<sup>20</sup> <https://colabor.pt/publicacoes/regresso-desemprego-massivo/>

<sup>21</sup> <https://www.dinheirovivo.pt/economia/crise-cortara-rendimento-a-2-milhoes-dos-trabalhadores/>

GDP is expected to fall by 6.9% and the unemployment rate is due to increase to 9.6% by the end of 2020<sup>22</sup> (the rate was at 6.2% in March 2020<sup>23</sup> in the period immediately before the start of lockdown).

The state of emergency ended on 2 May 2020, opening room to a gradual “deconfinement” and a progressive reopening of the economic and social activities.

### 5.3 Platforms reaction

While in the case of Airbnb there has been an almost total shutdown of the sector due to the suspension of international travel and confinement, in the case of UBER there has been a sharp drop in demand even if the sector had remain operating. It should be noted that Article 11 of the State of Emergency Decree stated that the activities provided "through an electronic platform" were not suspended, including UBER and other delivery platforms, and that some government speeches considered this sector as one of the "essential sectors".

Even if there is no data for this, it is to be assumed that, given the typification of the activity of Airbnb hosts in Portugal, they were left without any kind of support during this period. Data for Lisbon point to a 61% drop in activity in the annual comparison between April 2019 and 2020<sup>24</sup>. The same may be mentioned in relation to UBER drivers Average incomes of UBER drivers (unable to carry out their activity through telework or to stay at home, either in layoff or unemployment) were seriously reduced by the sharp drop in demand, as the maximum number of customers on each trip was also reduced. Despite being allowed to work as part of public interest<sup>25</sup>, they obtained very low social support. Due to the variety of types of contract, applying for unemployment benefits or similar forms of support proved difficult. The Government’s extraordinary measures adopted in March<sup>26</sup> excluded TVDE drivers and only in April was support extended to cases with a drop in income deeper than 40%. Moreover, a maximum threshold of €438.81 per month (up to 6 months) was established for State contributions. It is clear that confinement and social distancing, summed to a widespread breakdown of purchasing power<sup>27</sup> and the dramatic shrinking of tourism, have greatly reduced

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<sup>22</sup> <https://www.publico.pt/2020/06/09/politica/noticia/substituicao-centeno-coloca-orcamento-suplementar-segundo-plano-1919983>

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[https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine\\_destaques&DESTAQUESdest\\_boui=415271422&DESTAQUESmodo=2](https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_destaques&DESTAQUESdest_boui=415271422&DESTAQUESmodo=2)

<sup>24</sup> <https://jornaleconomico.sapo.pt/noticias/airbnbs-em-lisboa-e-porto-perderam-55-milhoes-em-marco-devido-a-covid-19-573163>

<sup>25</sup> Article 11 of the State of Emergency Decree stated that the activities provided "through an electronic platform" were not suspended, including UBER, and that some government speeches took this sector as one of the "essential sectors".

<sup>26</sup> See: "Extraordinary Support for the reduction of the economic activity of self-employed workers" (<http://www.seg-social.pt/apoio-extraordinario-a-reducao-da-atividade-economica-de-trabalhador-independente>)

<sup>27</sup> An estimated loss of income during this period reached close to 2 million workers – between 1.3 million in layoff; more than 300,000 to request Extraordinary Support to reduce the economic activity of self-employed workers; 115,000 applications for unemployment benefits by 15 May; among other informal situations that are

the needs of individual transportation, pushing many UBER's drivers to become UBER EATS couriers, moving into the delivery sector of the same platform, whose demand increased during the lockdown period<sup>28</sup>.

Regarding public health safety measures, although some were shared with TVDE partners, they often weighted as a direct burden on drivers<sup>29</sup>, provided they also partially share the financial exposure of intermediary enterprises with respect to car leasing and other kinds of instrumental costs. Preventive measures included the acquisition of masks and products for frequent cleaning of vehicles. Due to many TVDEs working with more platforms at the same time, the request of UBER competitors (such as Bolt and Freenow) also had to be applied, thus setting requirements standard to the top level: this is the case of the creation of an acrylic barrier separating passengers and drivers, which was initially implemented at the initiative of some drivers or TVDE, and became compulsory for other platforms before UBER itself could force to have it, already in the post-confinement phase. The control of such measures was complemented by requests of pictures and repeated questions formulated by the App before every service, and failure to comply with these rules could result in the deactivation of accounts.

For Airbnb, there was a strategy of temporarily placing property on the market for a short to medium term (during the months of confinement, lasting until the beginning of summer, assuming a resumption of tourism at that time) or the adoption of price reduction strategies<sup>30</sup>. Some Airbnb owner associations have required the Government and the Municipality of Lisbon to move from the Local Accommodation sector to the traditional rental market, but without such a change entailing the payment of various capital gains and the obligation to stay in such a market for at least 5 years – this request was eventually taken into account and is under discussion<sup>31</sup>, that, if it happens, will result into a priority of local accommodation over the long-term rental market.

It should also be noted that the Decree of the State of Emergency restricted several fundamental rights and freedoms – such as the right to strike in sectors considered "essential", or the rights of manifestation, assembly and resistance, thereby limiting the possibilities of labour claim. In the second period of the State of Emergency, the decree even prohibited the participation of trade unions and workers' commissions in the processes of labour legislation.

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not accounted for. <https://www.dinheirovivo.pt/economia/crise-cortara-rendimento-a-2-milhoes-dos-trabalhadores/9/29/2020 10:47:00 AM/0/00 0:00:00 AM>

<sup>28</sup> <https://www.publico.pt/interactivo/portugal-meio-gas-que-mudou-pais-suspenso>

<sup>29</sup> <https://www.publico.pt/2020/03/18/p3/noticia/deixe-pedido-porta-favor-podemos-continuar-encomendar-comida-online-1908251>

<https://www.uber.com/pt/pt-pt/coronavirus/>

<https://observador.pt/2020/05/14/mascaras-restricao-de-passageiros-e-selfies-de-verificacao-as-medidas-de-seguranca-da-uber-em-portugal/>

<sup>30</sup> <https://eco.sapo.pt/2020/04/04/da-caca-de-hospedes-nas-redes-sociais-aos-saldos-no-airbnb-alojamento-local-desesperado-com-o-covid-19/>

<sup>31</sup>See: <https://www.publico.pt/2020/05/02/economia/noticia/migracao-imoveis-al-arrendamento-sera-fenomeno-curta-duracao-1914708>

During this period there were several complaints of unlawful and/or abusive dismissals<sup>32</sup>, as well as other loss of employment rights and loss of employment.

The only nationwide demonstration or form of protest that occurred during the lockdown took place the day before the end of the state of emergency, being a celebration of May 1 “Workers’ Day” but also a protest under the lemma “Let’s fight the instrumental use of the virus for exploiting workers”. The act occurred through the rigorously organized presence of a small number of people that could comply with various health guidelines, under the coordination of CGTP, one of the mayor trade unions of Portugal. There have been some important protests in the logistics sector<sup>33</sup>, for example in the Port of Lisbon, due to insolvency proceedings that already preceded the state of emergency. After the end of the state of emergency, there have been two important demonstration: one on June 4 (organized by workers of the artistic sector) and one on June 6, 2020, which aimed to focus on the social effects of the crisis experienced<sup>34</sup>, and that ended up having as its main motto the anti-racist fight of “Black Lives Matter”.

## 5.4 Looking forward

In a framework where teleworking, data processing and last-mile logistics linked to e-commerce gained more influence than ever, the platform-based sector appears to be well prepared for taking a leading position on the market after the pandemic. Such an apparent advantage is not evenly distributed among all typologies of platforms, due to the fact the some of them depend – more than others – from other economic sectors such as tourism. Extremely representative of such asymmetry is the case of Airbnb, that is likely to go through a deep redefinition of its services and pervasiveness in the main cities: a large wave of selling-out of apartments which until march 2020 were mainly used for tourist accommodation became visible in the main Portuguese cities; and long-term rental is gradually imposing its attractiveness, proving less dependent from a touristic dynamic that still struggles to restart, due to chaos in the transportation sector, and in the too diverse deconfinement frameworks of different countries. In the mobility platforms, also a visible divide is taking place between goods mobility and people mobility, after the shift of pivotal services occurred during the state of emergency.

It is worth to underline that Lisbon represents an excellency centre for UBER and – often – is viewed as a laboratory for mainstreaming strategies. During the COVID-19 emergency period, the UBER ecosystem registered two important changes in Lisbon: (1) UBER’s departure from the micro-mobility sector (two-wheels-scooters and electric bikes), in favour of Lime<sup>35</sup>; and (2) the introduction of UBER Connect service<sup>36</sup>. Such a novelty, which counts on UBER drivers as

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<sup>32</sup> <https://www.despedimentos.pt/>

<sup>33</sup> <https://oestivador.wordpress.com/>

<sup>34</sup> <https://resgatarofuturo.pt/>

<sup>35</sup> <https://www.dinheirovivo.pt/empresas/trotinetas-e-bicicletas-partilhadas-da-uber-passam-para-a-lime/>  
<https://www.noticiasominuto.com/economia/1501048/uber-connect-ja-e-possivel-enviar-encomendas-atraves-da-plataforma> <https://www.uber.com/pt/blog/tc-uberconnect/>

mediators (and not on UBER EATS' couriers) is conceived as a competitor to other delivery and distribution companies, and thus accentuate the UBER commitment in the logistics field.

The conditions of UBER drivers (and weak Uber partners) seriously worsened during the COVID-19 emergency, and in the same direction of pre-existing signals of reduced social protection for this kind of platform-workers. If some type of drivers could eventually access universal welfare measures promoted by the national government, the main company and the same ecosystem developed under UBER's umbrella – including its institutional members in the municipality of Lisbon - didn't prove capable to put in place mitigation measures, didn't generate any kind of form of claim of protest, nor mobilized cooperative initiatives between worker themselves. The fragility of this ecosystem and the reduced city-level response (already necessary before, but made unpostponable during the crisis) leaves on the table a number of open questions regarding the actual sustainability of a municipal governance of platform economy. Meanwhile, UBER's commitment on being partner of Lisbon city hall in the creation and improvement of an "integrated mobility" systems come out reduced from the crisis, and its gradual shift to invest in logistics (and minimize all investments on human beings – both drivers and customers) seems well aligned with a general strategy of gradual "reduction of risks", where the weak-link seems to be represented by the human component, already framed by years of investments based on a "low-wage and low specialization labour" view.

We have to recognize that the intermediation features that characterized Lisbon platform model seems to have worked along and been procyclical with the exploitation mechanisms which are already entrenched in capitalist platforms (reproducing and even intensifying them in some cases), and the national framework on TVDE has failed to increase the accountability of UBER itself as a promoter of better working conditions (decentralising this responsibility to partners). Nevertheless, at the same time, we can expect some future positive changes, at least in the three following directions:

- 1) that on a longer time the same hybridity that characterizes Lisbon's ecosystem and social variety of its intermediaries could generate also forms of platform cooperativism, or even innovative welfare strategies where urban authorities can have a relevant role.;
- 2) that the growing recognition gained by whom has been publicly recognized as an essential worker during the pandemic emergency (as food delivery workers, for example, but also cleaners that work in closed spaces, which have been pointed out as the most dangerous during the lockdown) could gradually lead to a better recognition in terms of welfare and income conditions.
- 3) that the partial redirection of short-term rentals towards a more stable market, could determine larger changes on the management and governance of tourism and local economy.

## 6. LONDON

Authors: Eleni Kampouri and Tracy Walsh (University of Hertfordshire)

### 6.1 Platform economy urban background

The size of the platform economy in London cannot be accurately estimated because platforms refrain from making publicly available the data collected through their apps, as this data is valuable for generating investment and algorithmic management. All of the platform workers interviewed since the lock down on 23rd March 2020 expressed how their work had been impacted by the COVID-19 crisis.

Airbnb has been operating in London since 2008 and has spread so much that according to data from the independent platform Inside Airbnb, in 2018 it has reached approximately 1 million rentals, with more than 46,4% of these being multi-listings indicating that management companies have taken over the platform<sup>37</sup>. There is no reliable data on the decrease in demand after COVID-19 in London, but a rise of up to 45% in property listed for long-term rentals reported in early April indicates that many hosts were already leaving the platform for safer long-term rentals<sup>38</sup>. Interviews with hosts who rent rooms in the city showed that demand has dropped by a 100% and many of them have lost a precious source of income. The director of a management company that specializes on Airbnb also reported that its financial sustainability is in question.

Uber has been operating in London since 2012. It has succeeded in substituting the mini-cab industry in London by bringing costs down and establishing an app-based system that gave incentives to drivers to opt for it driven by the promise of more flexibility and non-human supervision. During COVID-19, as essential travel was permitted, Uber drivers could continue operating, but as early as March and especially after the lock down demand for services dropped by at least 60%-70% across the world according to Uber<sup>39</sup>. Some Uber drivers stopped working completely in order to reduce costs, and those that did carry on working after the lock down and normally made their living by working in the evenings and/or weekends, noticed a dramatic decrease in the amount of work, due to pubs, clubs and restaurants being closed.

Deliveroo has been founded in London in 2012 and it has been expanding ever since. Along with other delivery platforms including Uber Eats, it has replaced the decentralized delivery

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<sup>37</sup> Inside Airbnb (2020), “Airbnb London”, available at: [insideairbnb.com/london/?neighbourhood=&filterEntireHomes=false&filterHighlyAvailable=false&filterRecentReviews=false&filterMultiListings=false#](https://insideairbnb.com/london/?neighbourhood=&filterEntireHomes=false&filterHighlyAvailable=false&filterRecentReviews=false&filterMultiListings=false#)

<sup>38</sup> Wisniewska A. (2020) “How Airbnb hosts are fighting back against Covid-19 fall out” Financial Times, 3 April, available at: <https://www.ft.com/content/9d092b78-7045-11ea-89df-41bea055720b>

<sup>39</sup> Lunden I. (2020) “Uber says rides down in cities hardest hit by coronavirus, looks at delivering meds”, Tech Crunch, available at: <https://techcrunch.com/2020/03/19/uber-coronavirus-update/>



system, which relied on restaurant-based riders, that prevailed in the past. In general, as more people stayed at home, home cooking and avoidance of potentially infectious food has pushed towards a decrease in demand for food delivery. According to data from SimilarWeb, which tracks downloads and use of smartphones and websites, food delivery platforms experienced a general drop in demand in the UK, while grocery delivery increased significantly. According to this data, Deliveroo seems to have a small increase in deliveries across the UK, although this is mainly due to reorders rather than new customers<sup>40</sup>. For Deliveroo Riders, the beginning of the lock down period saw a decline in orders; one rider said this was due to customers being unsure about their income, so not wanting to order takeaways at that time. Several riders pointed out that the closing down of businesses affected them harder because of office closures as office deliveries, were more profitable than house deliveries. One rider said that he decided to take some time off of work and waiting to see if it would pick up again. When some food outlets reopened as takeaways, business for riders did start to pick up again, but, according to one rider, it was only at about 75-80% of the workload pre lock down.

Helping started operating in London after acquiring an already established platform Hassle in 2015. The expansion of Helping in London appears to be relatively limited, although there are no official statistics published. This may be linked to the fact that domestic work is mostly considered as a luxury by lower and middle-class British households, while, cleaning of commercial spaces is a very big market that absorbs many female unskilled migrants, who are unlikely to work for platforms because of illegality and deportability. During the lock down in London, domestic work and cleaning decreased significantly or stopped completely because of health concerns. We were not able to conduct any interviews with domestic workers using this platform yet.

Given the prolonged period of the health crisis and the ensuing economic crisis in the UK, it is likely that the situation has worsened for platforms in London. Especially Airbnb rentals, Uber rides and Helping cleaning will decrease further.

## **6.2 Covid impact and institutional measures**

Labour patterns in platform work in London tend to be outside the existing employment regulatory framework, both people working full-time and people working part-time to top up income from other sources (employment, pensions, social benefits) are labelled as “self-employed”. Cases taken to courts by labour unions have not established yet worker status for platform workers. As a result, platform workers were excluded from the Job Retention Scheme that provided 80% of payments by the government for companies forced to close. Platforms like Airbnb and Helping effectively closed but hosts and domestic workers were not recognised as workers, but as self-employed.

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<sup>40</sup> RTE, “Online delivery firms knocked off course by coronavirus crisis”, available at: <https://www.rte.ie/news/business/2020/0407/1129082-online-meal-delivery-firms-knocked-off-course-by-virus/>

The UK government introduced a Self Employment Income Support Scheme (SEISS), which provided 80% coverage of previously declared earnings<sup>41</sup> and made changes to the Universal Credit System for the self-employed to cover living costs<sup>42</sup>. Platform workers, who saw their job diminishing were in need of such support because they had to continue financing costs, like car insurance and car leasing for Uber drivers and mobile phone bills for all. However, many platform workers were not eligible to apply for these schemes. In effect, platform workers were pushed to continue working despite the risks to their health<sup>43</sup>.

One of the most contentious issues that platform workers faced was lack of access to statutory sick pay and parental leaves. For self-employed or workers in the gig economy who had no access to Statutory Sick Pay (SSP), the government facilitated easier access to other social benefits, including the Employment and Support Allowance (ESA), which can be claimed on the first day of the lock down instead of the 8th day period of being out of work<sup>44</sup>. However, claiming unemployment benefit is a procedure that takes long, and financial assistance is limited. For those with no access to Statutory Sick Pay (SSP), the government took measures to make access to other social benefits easier and gave them the opportunity to apply online to register. Many platform workers, however, lacked access to those benefits because they couldn't fulfil contributory period conditions.

There were no paid leaves for workers, who contracted the virus or workers with care responsibilities, especially women, whose reproductive labour increased during the crisis as a result of the closure of schools, day care and elderly care centres as well as the need to provide for sick relatives. The only exception was Deliveroo's Emergency Hardship fund, with provision for 14 days payments in excess of the equivalent statutory pay for 14 days for sick platform workers who were diagnosed with COVID-19. However, the scheme was criticized because it required riders to provide official diagnosis of COVID-19 or doctor's order to self-isolate. These certificates are difficult to obtain given the unavailability of tests. Helping UK suggested on its web-site to customers to "keep current bookings as they are" so cleaners still have regular work, but also reducing the duration of bookings or pausing customers' relationship with domestic workers if

In London, the pandemic broke out when procedures for the exit of the UK from the European Union were ongoing. The combined impact of the Brexit and COVID-19 crises made migrant workers, who were already deprived of access to social protection because of their nationality, even more vulnerable. An Uber driver from India, for example, was reported dead without

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<sup>41</sup> UK Government (2020 a) "Self Employment Income Support Scheme: Self employment and issues", available at: <https://www.gov.uk/government/publications/self-employment-income-support-scheme-service-availability-and-issues>

<sup>42</sup> UK Government (2020 b) "Universal Credit", available at: <https://www.gov.uk/universal-credit/eligibility>

<sup>43</sup> Notes from below (2020) "The tensions of the pandemic in the UK", in *Struggles in the Pandemic: A Collection of Contributions on the COVID-19 Crisis*", available at: <https://notesfrombelow.org/issue/struggle-pandemic>

<sup>44</sup> ETUC (2020) "COVID-19 watch: Non-standard platform workers ETUC Briefing Note, available at: [https://www.etuc.org/sites/default/files/publication/file/2020-03/PF%20Covid-19%20Briefing%20NSW%20-%20Platform%20workers%20%2BSC%20v.Ludo2\\_.pdf](https://www.etuc.org/sites/default/files/publication/file/2020-03/PF%20Covid-19%20Briefing%20NSW%20-%20Platform%20workers%20%2BSC%20v.Ludo2_.pdf)

medical assistance after avoiding contacting the National Health Service (NHS) for fear of eviction<sup>45</sup>.

### **6.3 Platforms reaction**

Platforms have been under pressure to address the impact of the pandemic as they are likely to suffer damages not only during lock downs but also after them because of drop in consumption and economic crisis.

Uber and Deliveroo have developed social responsibility campaigns in response to COVID-19, that included providing accommodation, free rides and meals for medical personnel.

Some platform companies have started the so called “zero contact” options to avoid face-to-face contacts between customers and platform workers. Deliveroo workers doubted, however, that this company policy protected them effectively from contracting the virus, as (a) it depended on customers activating this option on their app and (b) zero contact was not respected in reception points, for example in restaurants or super-markets for Deliveroo.

Most platforms didn't take measures to provide workers with necessary protective equipment, including masks, gloves and disinfecting liquids. The costs of these necessary materials were passed on the workers. Only Deliveroo made available free masks and hand sanitizer to “any rider who has completed at least 1 delivery in the past 3 weeks and has an active rider account”. Because of delays, however, riders were also given the option to get reimbursed for £20 upon receipt of purchase of protective equipment. Helping providers were advised to bring and wear personal protective equipment and organised a webinar about cleaning and extra hygienic measures during COVID-19. Customers could check in the public profiles of the cleaners if they had attended webinars.

With regards to Airbnb hosts, there have been a global outrage when the company offered to provide full compensations to customers because of COVID-19 cancellations. In response, the company offered to compensate hosts who saw their rentals cancelled during lock downs with a rescue package of £200m covering 25% of what hosts would have been paid under cancellation policies between the 14th of March and the 31st of May 2020. In addition, a \$10m relief fund was created for “super hosts” offering grants of up to \$5,000. Airbnb also went ahead with job cuts and the founders declared that they would take no salary for six months, and top executives will have their salaries halved<sup>46</sup>.

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<sup>45</sup> Fairwork Foundation (2020 a) “How is the platform economy responding to Covid-19?”, available at: <https://www.opendemocracy.net/en/oureconomy/how-platform-economy-responding-covid-19/>

<sup>46</sup> Neate N. (2020) “How the Covid-19 crisis locked Airbnb out of its own homes”, available at: <https://www.theguardian.com/technology/2020/apr/04/how-the-covid-19-crisis-locked-airbnb-out-of-its-own-homes>

## 6.4 Looking forward

Labour process: One viable hypothesis is that labour struggles will intensify in platform work in the aftermath of the pandemic demanding labour rights and a recognition of their labour status as workers.

IWGB couriers and delivery branch has reacted promptly to the Challenge of COVID-19 for platform workers which include 10 key demands: Full pay for self-isolation, regular testing, enhanced payment during lock-downs, temporary leave payment, social distancing in place, free safety equipment, communication between riders and platforms with regular updates by companies, halt in terminations, government guarantees of basic pay and conditions, guarantee of real living wage and cost coverage during low demand. All these demands may apply to platform workers more broadly provided that as the United Private Hire Drivers branch of the IWGB requested worker status is recognised for all workers<sup>47</sup>. These demands may be reinforced by previous judicial cases and a recent decision by the European Court of Justice on the 22nd of April 2020 that effectively recognised that platform companies, Uber in this case, are not software companies acting as intermediaries between providers of services and customers<sup>48</sup>. Despite efforts to release the hardship temporarily these demands didn't radically alter the labour status and working conditions of platform workers in London during the pandemic

However, platform companies have so far taken only emergency measures and they are likely to be opposed and fight against court decisions granting platform workers legal recognition and rights. The same applies to measures to improve skills, which are limited to temporary emergency measures, such as Helping's webinars to enhance skills related to protection from COVID-19 rather than broader health and safety skills for domestic workers. The welfare of platform workers will depend on broader community structures rather than platforms. As Notes from below argue, there are many local mutual support initiatives that emerge around London and may gain strength as the crisis deepens (Notes from below 2020).

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<sup>47</sup> IWGB Couriers and Logistics Branch (2020) "COVID-19 demands for the industry", available at: <http://ridersroovolt.com/wp-content/uploads/2020/03/CLB-Industry-demands.pdf>

IWGB, 2020, "Our Covid-19 response" available at: <https://iwgb.org.uk/covid-19>

<sup>48</sup> European Court of Justice (2020), "Case C-692/19: Reference for a preliminary ruling from the Watford Employment Tribunal (United Kingdom) made on 19 September 2019 – B v Yodel Delivery Network Ltd", available at: <https://eur-lex.europa.eu/legal-content/GA/TXT/?uri=CELEX:62019CN0692>

## **7. PARIS**

Authors: Laurent Baronian, Carlotta Benvegnù (University of Paris XIII)

### **7.1 Platform economy urban background**

In Paris platform activities have grown rapidly during the last years, particularly within the tourism industry. The most dynamic and competitive sector is transport, the second is accommodation. The two biggest platform economy enterprises operating in Paris are Uber and Airbnb. However, aside from those multinational platforms, 70% of platform economy enterprises are domestic startups. The city registered also the attempt of local administration to regulate digital platforms, especially Airbnb. The housing issue was first and foremost raised by a deputy mayor in charge of housing, Ian Brossat, part of the left-wing majority running the municipality. The City of Paris introduced measures designed to control the proliferation of short-term rentals, and in particular the illegal use of residential apartments for tourism as the law (Loi ELAN, law n° 2018-1021) limits short rental to 120 days per year and restricts the possibility for short-term rent to main residences only. In order to fight against illegal short rentals, the local administration has introduced the obligation for the hosts to get a registration number from Paris City Hall office responsible for the monitoring and the prosecuting illegal short rentals (the BPLH).

### **7.2 Covid impact and institutional measures**

Starting from the 17 March 2020, all the country was under a total confinement, which means that people couldn't leave from their home except for some imperative reasons (bringing a written justification): buying food and drugs, visiting the family for emergency cases and going to work if and only if teleworking was not possible. This measure has followed the close of schools, nurseries and universities few days before. Production has been limited to activities "essential to the nation" only. The phase 2 of the deconfinement began on 2 June: all departments are going green except for Guyana, Mayotte and Île-de-France, the region of Paris.

In the Parisian area, the pandemic made social inequalities and their territorial stratification within the metropolis even more striking. While it is estimated that around 17% of Parisians have fled the confinement to a secondary residence at the very beginning of the crisis, the department of Seine-Saint-Denis (93), the poorest in France, is the one registering the highest mortality rate (a 63% raise compared to barely 32% in Paris "intra muros" at the beginning of April). Housing conditions and the lack of resources in hospitals played a central role, but this is also linked to the fact that these are the territories that provide the bulk of the labour force employed into the "essential" sectors, which have not stopped their activity during the period of confinement: garbage collectors, logistics workers, cleaners, transport and care workers. A

lots of them are also platform's workers, Deliveroo drivers and Uber drivers especially.<sup>49</sup>

### 7.3 Platforms reaction

In Paris, as in the rest of French territory, food delivery platforms (Deliveroo) and transport platforms (Uber case) never suspended their service. All major firms declared a positive trend, after a first moment of difficulty. The impact of Covid-19 on Airbnb was opposite, as tourism collapsed. Few information are available on Helping.

In terms of working conditions and protections Deliveroo, and other gig economy firms, e-mailed the delivery workers to remind them of the hygiene measures needed for an (quite impossible according to the workers) "contactless delivery". At the other end of the chain, user restaurants are offered lower commissions as an incentive to join the market<sup>50</sup>. Moreover, in terms of work organization, just before the lockdown Deliveroo decided to remove the schedule and introduce the "free shift"<sup>51</sup>.

Most platforms, such as Uber Eats, have set up financial assistance for sick delivery workers with Covid-19. However, what the platforms did not advertise is that they actually had to have earned €130/week in a month to be eligible, according to Jérôme Pimot, co-founder of the CLAP, a rider's union. This only compensates regular, so-called "active" delivery drivers: "this fund was set up to support delivery drivers who regularly drive for us," Deliveroo responded to a sick delivery driver<sup>52</sup>.

In terms of State social welfare programs, extraordinary welfare measures have been introduced by the French government for self-employed workers, so that platform workers are in principle eligible for payments from the government's solidarity fund. However, as they must prove that the platform is their main activity and that their income in March was 70% lower than last year's, this means that a majority of couriers and drivers might be ineligible.

### 7.4 Looking forward

Despite the slowdown in activity linked to restaurant closures and layoffs, delivery platforms seem to be the best positioned on the market in the pandemic, as they are extending their usual market to other types of services as well as to public-private partnerships. Furthermore, major retail firms have accelerated their conversion to e-commerce and home delivery. This includes new partnerships to come with the main meal delivery platforms (Uber Eats and Deliveroo).

Concerning short term location (Airbnb), according to an analysis of data extracted by Inside Airbnb in Paris, the number of advertisements available for whole houses would have fallen

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<sup>49</sup><http://www.intotheblackbox.com/wp-content/uploads/2020/05/Struggle-in-a-Pandemic-FINAL.pdf>

<sup>50</sup><https://www.jacobinmag.com/2020/06/logistics-covid-coronavirus-amazon-online-delivery-shipping>

<sup>51</sup><https://www.lesinrocks.com/2020/04/17/actualite/societe/journal-dun-coursier-a-velo-non-confine-ca-commence-a-etre-pesant/>

<sup>52</sup><https://www.contretemps.eu/capitalisme-plateforme-deliveroo-uber-covid19/>

by more than 10% between mid-March and mid-April, i.e. almost 7,000 fewer advertisements. The impact of the crisis on this platform in Paris risks to be huge, as the mayor of Paris, Anne Hidalgo, said on Thursday 4 June that if she is re-elected, she intends to buy Airbnb units to put them back on the long-term rental market.

## 8. TALLINN

Authors: Kairit Kall, Liis Ojamäe, Triin Roosalu, Marge Unt (Tallinn University)

### 8.1 Platform economy urban background

Although proper statistics is lacking, the available indicators highlight a rather widespread usage of taxi and accommodation platforms in Tallinn, whose entry to the market has generally been celebrated with neoliberal market-oriented techno-optimistic views. Majority of platforms – including Uber and Airbnb – operate as service providers, not as employers, and this is accepted also by state authorities, who have even revised tax collecting systems to make it easier to declare income earned through platforms. Collective organization against platforms is relatively modest. When taxi platforms entered into taxi industry and were not regulated at all, there were controversies and heated debates that led to the re/de-regulation of the taxi services. The revised Public Transport Act legalized platform taxi services, setting some obligations for drivers using platforms and reduced the requirements for operating traditional taxis – unifying these two services, with some (city-level) differences still remaining. Hospitality sector is still unevenly regulated, with services provided via Airbnb and other accommodation platforms being less regulated than those of traditional hotels etc. Currently debates around the impact of Airbnb on hospitality sector and on the well-being of other residents of the buildings where apartments are rented and the necessity to regulate the platforms are on-going. Generally, platforms seem to have de-regulative impact on the market.

### 8.2 Covid impact and institutional measures

Estonian government declared an emergency on 12th of March 2020 (first recorded case was on 27 February) and it ended on 18<sup>th</sup> of May (some restrictions still remaining). Although remote work was promoted, most public institutions (including schools) also operated on remote basis, sport clubs and other non-essential services were closed, people were still allowed to move freely within the country (except for one island with high outbreak) with reasons such as work obligation, shopping for basic necessities and exercising, following 2+2 rule in public spaces. Neither taxi nor accommodation services were prohibited but as tourism collapsed and people were staying mostly at home, these services diminished considerably. Until June 2020 1947 confirmed COVID-19 cases have been recorded, with 69 deaths<sup>53</sup>.

It's not clear how much the Uber turnover has changed, similar platform Bolt announced 85% decrease<sup>54</sup>. Hot debate in the beginning of April was around the issue of Uber's competition Bolt asking to borrow €50 million from Estonia (as their revenues had dropped and commercial

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<sup>53</sup> <https://www.terviseamet.ee/en/covid19>

<sup>54</sup> <https://www.postimees.ee/6946895/avivar-kokk-bolt-peaks-enne-riigilt-raha-kusimist-peeglissee-vaatama>



banks were not willing to provide the loan on the suitable conditions)<sup>55</sup> which was not granted<sup>56</sup>. The state decided not to provide the loan, but the government compensated salary losses for the employees of many companies whose business activity decreased. Also Bolt got 1.4 mil EUR support from Public Employment Office. However, it's important to note that platform workers were not eligible, as they are not employed by the platforms. Support by state only concerned employees. For small enterprises up to 49 employees or self-employed, it was possible to apply for support up to 5000 EUR in case the turnover was higher than 20 000 EUR in 2019<sup>57</sup>, this measure did not apply to accommodation industry.

### **8.3 Platforms response**

Uber continued providing services in Tallinn, but during Uber's first wave of redundancies related to COVID-19 pandemic, they made redundant all employees of their Tallinn office<sup>58</sup>. It appears that Uber drivers were not even notified about this, as in a Facebook forum of Uber drivers in the end of May people were complaining that Uber office is closed and asked if anybody knows when it will be open. As a response people were sharing newspaper article about Uber redundancies. Apparently, now driver support for Tallinn drivers will be delivered through Uber's Polish office. From the forum it is also clear that the number of clients had decreased considerably, with some drivers claiming that they have not had any orders for days or even weeks. This is understandable, as in Tallinn market is divided by different taxi platforms, local market is ruled by Bolt. Therefore, most Uber clients are tourists, and tourism has collapsed due to the pandemic and set restrictions. Uber did not provide their drivers any safety equipment during the pandemic (some drivers were complaining that only in May Uber orders them to wear face masks). Some taxi companies installed partition screens and started providing delivery services<sup>59</sup>.

According to media coverings (no official data available), short-term rental market including Airbnb experienced a deep downturn during the emergency situation, with only minor activities due to the lack of tourists (Airbnb rentals were to some extent marketed as places for COVID-19 quarantines or as temporary "home"-offices for those not able to work from home). The near collapse of the short-term rental market was reflected also in general housing market trends during the period: previous short-term rental apartments have been increasingly in offer on the regular, long-term rental market, thus making the long-term rental market to an extent and, possibly only temporarily, more affordable to local residents<sup>60</sup>. A mobilisation of professional Airbnb hosts towards forming a joint association together with other short-term rental providers was noticed, but not directly as a response to COVID-situation. These activities were rather prompted by the proposal put forward by the Mayor of

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<sup>55</sup> <https://news.err.ee/1074851/bolt-asks-for-50-million-loan-from-state>

<sup>56</sup> <https://digi.geenius.ee/rubriik/uudis/bolt-ootas-ule-kuu-aja-ministri-vastust-laenu-ei-saa/>

<sup>57</sup> <https://www.eas.ee/teenus/covid-ettevotlus/>

<sup>58</sup> <https://www.foundme.io/uudised/2020/05/26/uberi-suurkoondamine-jattis-firma-eestis-tootajateta>

<sup>59</sup> [https://tarbija24.postimees.ee/6936257/Tallinnk-takso-hakkab-kaupa-vedama?\\_ga=2.165490495.1688433571.1591473113-2133727612.1578647596](https://tarbija24.postimees.ee/6936257/Tallinnk-takso-hakkab-kaupa-vedama?_ga=2.165490495.1688433571.1591473113-2133727612.1578647596)

<sup>60</sup> <https://news.err.ee/1098886/Tallinn-rental-offers-in-may-up-75-percent-from-in-a-year>

Tallinn to induce stricter regulations on short-term rental apartments in Tallinn<sup>61</sup>. This kind of proposal met a rather strong market-liberal response on behalf of professional companies in the short-term rental market. So, it cannot be interpreted as a mobilisation of hosts as platform workers, but rather as a form of securing one's market interests as professional market actors in the hospitality market. The mobilisation is certainly not against the platform, but rather against the potential public regulations of the market.

## **8.4 Looking forward**

It is possible that Uber drivers will (continue to) diversify their earnings via other gigs/platforms/jobs (like food delivery) or stop providing services via Uber in total as it seems that Uber has become even more marginal taxi service provider in Tallinn (where Bolt dominated platform taxi business before the pandemic) that it was before. On the other hand, as unemployment rate has been on the rise<sup>62</sup>, platform work might be one of the few options available for those who have lost their jobs.

During June, in the local Facebook forum of short-term rental hosts (including Airbnb) there could already be seen positive discussions about a slow market recovery. It seems that demand for Airbnb services has increased to some extent after Estonia opening the borders with other Baltic states and Finland. While the incoming tourism is in decline, local tourism is increasing, but it affects more the rentals outside of Tallinn as summer resorts are other cities. This means that Airbnb hosts can continue their activities to certain extent. The public discussion about the need (or not) to regulate short-term rental market has brought forward more openly the concerns of local residents (even if those voices are still less heard than more those of more powerful market actors), especially in historical central parts of Tallinn (the Old Town as the most critical case in that matter) about the increasing numbers of Airbnb and other tourist apartments in the area, disturbing local residents and causing damage to the built heritage in the area. However, since the public discussion on that matter has only begun, further developments remain to be seen and it is not clear at the moment whether and how those possible regulations (if they will be enforced at all) will affect the lives and hosting activities of private small-scale Airbnb hosts.

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<sup>61</sup> <https://news.err.ee/1094907/Tallinn-mayor-wants-to-require-licensing-for-guest-apartments>

<sup>62</sup> <https://www.stat.ee/pressiteade-2020-061>

## 9. CONCLUSIONS

COVID-19 pandemic has had a massive impact at social and political levels, deeply transforming everyday life and challenging future perspectives to an extent that it is still largely unknown. However, COVID-19 outbreak has also impacted on PLUS research fieldwork motivating us to write a specific research report. Digital platforms, in fact, have been significantly exposed during the lockdown, facing the challenges deriving from this peculiar moment, but emerging also as a candidate to play a crucial role in the socio-economic crisis that will follow the virus outbreak. Thus, from our perspective, despite this phenomenon has forced us to re-organize and adapt PLUS project to the new challenges brought by the pandemic, this has also been an opportunity to look at our topics from a new angle. As the pandemic state of emergency has pushed us to look at things under a new light, this has consolidated concepts and hypothesis we have developed. Therefore, we have paid attention at the general impact of COVID-19 on platform economy, especially on platform workers, but also on their responses to the emergency and on future platform economy developments, given the four platforms in our study – Uber, Airbnb, Helping, Deliveroo – are a relevant indicator of the possible tendencies that are getting structural in the post-outbreak scenario.

Pandemic clearly revealed the overlapping between digital platforms and urban spaces, both as infrastructures and as markets. However, we should also highlight that even if the virus virtually has had a global impact across sector, this does not mean that everyone and everything has been impacted in the same way. At the same way, while the impact of COVID-19 has had crucial effects in all cities considered in PLUS, this was not the same for all platforms. Put it differently, platform economy is not a homogeneous phenomenon and pandemic emphasized differences between services and companies too. On one hand service platforms like Helping or Airbnb have faced a “collapse”, with services demand nosediving in whole Europe and Airbnb hosts moving their apartments back on longer term market. On the other, last-mile logistic platforms - such as Deliveroo and Uber - have emerged as “essential services”, as underlined by Bologna’s team, meaning they have been keeping operative in the lockdown which has characterized cities globally. In the first case, in fact, we have witnessed not only a massive reduction of platform’s market, which is also underlined by a general tendency to reshoring of apartments in the long-term market – including in the case of Lisbon where the municipality is intervening in favoring this – but it also emerges serious concern about the future perspectives of these platforms. Indeed, logistic platforms seem to have had a better response to lockdown where Uber, despite a significant reduction of service demand, has managed to keep working and Deliveroo has even expanded its market with more demand and also more work offer.

Another crucial evidence emerging from our reports deserving to be underlined is that, despite the significant efforts of European government to guarantee support to all those affected by lockdown consequences – that in many cases has led to exceptionally extending support to self-employments – platform workers have rarely benefited from them. The ambiguities characterizing this sector of recent formalization have limited the impact of such intervention to more continuative platform workers, as those who are usually formalized as self-entrepreneur. This means that the vast majority of platform workers, who discontinuously operates under casualized legal arrangements, has actually been excluded from these

protections. Thus, we may say that even during COVID-19 outbreak platform workers faced a lack of welfare protection, sliding away from both programs for employed and self-employed. In sum, the disruptive impact that digitalization has on labour and workers welfare protection, it has been confirmed during COVID-19, and this despite the expansion of social protection towards self-employment.

	<b>Barcelona</b>	<b>Berlin</b>	<b>Bologna</b>	<b>Lisbon</b>	<b>London</b>	<b>Paris</b>	<b>Tallinn</b>
<i>Lockdown</i>	21st March – 19th June	No lockdown. Restriction from 23rd March – 6 <sup>th</sup> May	4 <sup>th</sup> March-4 <sup>th</sup> May	18 <sup>th</sup> March- 2 <sup>nd</sup> May		Lockdown 17th March – 11th May ( 2nd June, end of all restrictions)	No lockdown. Restrictions from 12 <sup>th</sup> March – 18 <sup>th</sup> May
<i>Most effected regions</i>	Madrid and Catalonia	Bavaria, North Rhine-Westphalia	Lombardia, Emilia-Romagna and Veneto	Lisbon and Northern Region		Ile-de-France, Grand-Est, Hauts-de-France and Guyane + Outre-Mer (Guadeloupe, Guyane, La Réunion, Martinique et Mayotte)	In Estonia it was Saaremaa & Võru, no information by districts in Tallinn
<i>Economic impact</i>	-9% - 12% of NGDP	-6,8% of NGDP. 10% of esteemed unemployment in Berlin	10% NGDP and 12% of esteemed unemployment	-6,9% of NGDP and 9.6% of esteemed unemployment		Between -9% and -12,5 % of NGDP in 2020 depending on the analysis.	-10% of GDP compared to the last year, the unemployment 13% by the end of 2020 (projections by Estonian Bank)
<i>Social benefits for platform workers</i>	For self-employed but platform workers were not fully covered	For self-employed but platform workers were not fully covered	For self-employed but platform workers were not fully covered	For self-employed but platform workers were not fully covered	For self-employed but platform workers were not fully covered	Extended to self-employed, but limited coverage for platform workers.	Social protection remained limited to traditional employments

Lack of welfare protection is not the only reason making platform workers particularly vulnerable for COVID-19 impact. In many cases, as for example for Deliveroo, Helping or Uber, platform workers are also particularly exposed to risk of infections. This both because they kept operating in external environment, but also because digital platforms did not provide any support or just provided very little for their workers. Personal protective equipment, in fact, except for Deliveroo in London, has not been provided to any platform workers while, in many cases, they received through online training – as in the case of distanced deliveries for Deliveroo in Bologna or Helping workers in London – new tasks to be accomplished. In other cases, as for example Helping in Berlin, digital platforms attempted to sell PPE to their workers, which led to their protest. This means that platform workers were not only in charge

of facing the risk of infection and the costs of its prevention, but that platforms denied responsibility for these aspects. In the context of COVID-19 pandemic, in fact, platform business model and the lack of rights for platform workers it determines have an impact on workers' health, but also generally on public health. This means that the disruptive impact of platforms which we have underlined in previous research outputs it is confirmed in this report, and furthermore it highlights the strict relationship between workers' right and the general social sustainability of platform business model.

Platform response to COVID-19 outbreak has also provided new perspectives to explore as companies quickly adapted their organization to the new conditions. Platforms partially changed their business model both to reduce costs and to extend market segments. Firstly, we have seen how Tallinn, Barcelona and Lisbon not only faced a restriction of the market for platform workers, but they have also experienced mass redundancies of a part of office workers. Tallinn and Barcelona, in fact, host one of the biggest European Airbnb call center, and the same is for Lisbon and they have been shut down immediately after COVID-19 outbreak. Secondly, in some cases workers had to face also transformations on labour organization which do not consider the necessity to prevent virus spread. As mentioned above, platforms largely responded to sanitary risks by avoiding taking responsibilities in prevention, so downloading risks and costs to platform workers by making use of the ambiguities characterizing their employment regulation. Thus, Deliveroo in both Barcelona and Paris has opened to free shift, which means allowing food delivery workers to log in without clear timings, aiming to provide an increasingly continuous service. Our report underlines how this innovation was already announced, but lockdown convinced Deliveroo to move up this which seems to be crucial not only because it allows to increase working time, workers internal competition and potential profits, but also because it will play a key role in determining the future of food delivery and other logistic platforms. We may say the same for Uber which in Lisbon have decided to launch the "connect" service during the same day, as there has been an increasing demand for home delivering going beyond restaurant meals. Finally, the great exposure platforms faced during lockdown has also been an opportunity to conduct marketing operations aiming to clean their public image. In many cases, platforms have in fact been accused of being extractive organizations which are not intended to redistribute the wealth they create neither to workers or the local communities where they operate. Thus, lockdown has been an opportunity to appear as socially responsible companies, as it was the aim for Deliveroo in delivering free meal to healthcare workers or Airbnb who suggested to give them free rents. Similarly, as lockdown has motivated owners to move their apartment to long-term rent, Airbnb, after discouraging this for long time, they are now suggesting host to do the same, as tourism, especially short term, seems to be one of the last sector which will recover from the outbreak.

Another crucial point which deserves to be underlined is how conflict of platform workers has generally increased during COVID-19. Firstly, the lack of responsibility of platforms toward workers' health has motivated protests in all continent for logistic platforms, as in the case of Deliveroo workers in Bologna, or that of Uber drivers in UK. Since in both cities we have an already ongoing unionization of these workers, their unions have in fact claimed for both platform responsibility, but also for governments to shut down the service. However, protests have also rose in platforms which did not experienced significative protests so far. This has

been the case of Helpling, where workers protested against the decision of the platforms to sell PPE to their workers instead of providing them for free, or it has been the case of Airbnb host in Tallinn, where they organized in order to prevent a stricter economic regulation of their activities. Thus, even if they are still fragmented both in their practices and aims, we see how COVID-19 has accelerated a tendency towards more collective forms of actions which is now rapidly spreading in platform economy.

*Last but not least*, we have also faced a difficulty for local municipalities to address consequences of the pandemic, as emergency measures have reduced their possibility of action. However, we also see how their crucial role is coming back alongside a relaxation of restrictions due to prevent virus spread. This is in fact the case of Lisbon and Paris, where the municipality seems to be oriented in favoring a shift of home offer from short-term to long-term rentals. Similarly, this is the case of Bologna, where the local municipality that has already positively intervened on food delivery sector regulating it with a local bill of rights, it is now aiming to facilitate the establishment of a local delivery service alternative to big platforms. In both cases, these processes have been facilitated by the impact of COVID-19 which has shortened the distance between platform workers and traditional economic actors such as house owners or restaurants.

Thus, despite the difficulties COVID-19 has brought in our everyday life, we see how digital platforms not only have confirmed their crucial characteristics, such as that of downloading risks and costs on workers, or that of avoiding their social responsibilities – if not in a washing perspective as in the case of Deliveroo and Airbnb social campaign - but they have also rapidly adapted in order of both preserving their business and in getting the opportunities offered by pandemic. In this sense, we see how digital platforms tends to benefit from such socio-economic crises, as their same success was related to the impact of 2007 financial crises and following austerity policies. Thus, despite the difficulty the four platforms investigated have faced during lockdown, they not only seem to have survived to the lockdown, but they seem to be oriented to become even more influential for the future of the economy. Nonetheless, the great media exposure they have faced, which in some cases even brought about the label of “essential services”, and the lack of rights and of welfare protection platform workers still face looks like an explosive mix which may determines a round of labour struggles. In this context, despite platforms keep enlarging their market and getting prepared to offer gig jobs for the many new unemployed in the continent, it looks like platform workers have the chance to claim better condition both inside and outside platform contexts. This means that the uncertainty characterizing platform economy after COVID-19 outbreak do not only include the future of their market, but it is the very same model which seems to be increasingly challenged.

Tab. 2 – Platforms reactin to Covid-19 outbreak

	<b>Barcelona</b>	<b>Berlin</b>	<b>Bologna</b>	<b>Lisbon</b>	<b>London</b>	<b>Paris</b>	<b>Tallinn</b>
<i>Deliveroo</i>	Market Increased PPE were not provided No paid leave Labour transformation (Free shift).		Market Increased Workers protested PPE were not provided No paid leave Workers protested		Market decreased in favour of groceries Paid leave (14 days) PPE were provided Platform social campaigns (free meal for health workers)	Market Expanded. PPE were provided but in a small amount. Paid leave (2 weeks) but under conditions. Platform social campaigns (free meal for health workers) Labour transformation (Free shift).	
<i>Airbnb</i>	Market went totally down Apartments went on long-term rentals Office workers were fired Platform social campaign (free rents for health care workers)	Market went totally down (under local regulation) Apartments went on long-term rentals Platform social campaign (free rents for health care workers)	Market went totally down Social campaign (free rents for health care workers) Platforms protested for governaental aids	Market went totally down Apartments went on long-term rentals Municipality want to intervene prioritizing long-terms rentals	Market went totally down Social campaign (free rents for health workers) Rescue package was offered for hosts and superhosts	Market went totally down. Social campaign (free rents for health workers). Municipality wants to intervene buying apartments and prioritizing long-terms rentals.	Market went totally down Apartments went on long-term rentals Hosts association was formed to lobby against public regulation
<i>Uber</i>		Kept working with less orders PPE were provided by Uber (under local regulation) Fare reductions		Kept working with less orders PPE and sanitizing tools were not provided Departure from micro-mobility market Opening of Uber Connect	Kept working with less orders PPE and sanitizing tools were not provided	Kept working with less orders. PPE and sanitizing tools were provided. Sick leave for a period “of up to” 14 days based on the profits generated on the platform during the previous two weeks	Kept working with less orders PPE and sanitizing tools were not provided Office workers were fired
<i>Helpling</i>		Orders declined around 50%. PPE were intended to be sold to workers Workers protested	Kept working but with an undefined decline of orders		Almost stopped. Webinar for preventing infection	Few information available	

