

TALLINNA ÜLIKOOLI RAHVUSVAHELISTE SOTSIAALUURINGUTE KESKUS

PLATFORMISATION OF TALLINN'S TAXI INDUSTRY: RESULTS FROM THE PLUS PROJECT

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RASI

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ÜLIKOOL**

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Rahvusvaheliste Sotsiaaluuringute Keskus (RASI) on Tallinna Ülikooli Ühiskonnateaduste Instituudi sotsiaalteaduslik interdistsiplinaarne teadus- ja arenduskeskus, mis teostab teadusprojekte. RASI teadurid on tegevad ekspertidena ühiskonnaelu analüüsimisel ja kujundamisel. TLÜ RASI uurimisteemad hõlmavad ühiskondliku ebavõrdsuse (või ka kihistumise) erinevaid tahke – sugu, rahvus, vanus, põlvkond, haridus, ametipositsioon. Viimastel aastatel on hakatud suurt tähelepanu pöörama elukestva õppe probleematikale kui eluteed kujundavale ja sotsiaalset sidusust Eestis ning laiemalt kogu Euroopa Liidus tagavale tegurile. Teine uuem temaatika osakonna uurimistöös on seotud aktiivse vananemise küsimustega.

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Contents

EXECUTIVE SUMMARY	4
INTRODUCTION	9
METHODOLOGY	11
PART I: INSTITUTIONAL CONTEXT	16
1.1. Platformisation of the taxi industry: Competitive pressures and changing regulations 16	
1.2. Working conditions, labour standards and collective mobilisation	18
1.3. Employment status and tax compliance	20
1.4. Social protection	23
1.5. Regulations ‘in becoming’	26
1.6. City-level regulations for the taxi industry in Tallinn	28
1.7. Impact of the 2020 Covid-19 pandemic	29
PART II: PLATFORM WORKERS’ PERSPECTIVE	31
2.1 Labour process	31
2.2 Skills	37
2.3 Social protection	42
2.4 Perception of the impact of the pandemic	45
2.5 Alternatives to the current status quo	46
References	48

EXECUTIVE SUMMARY

The executive summary highlights the main conclusions based on the empirical research conducted in Tallinn between 2019 and 2021 for a European Union-funded project *Platform Labour in Urban Spaces: Fairness, Welfare, Development* (PLUS). The project aimed to map the situation and changes in the platform economy in general and in the ride-hailing/taxi industry and accommodation/hospitality sector in particular. The current summary focuses on the ride-hailing/taxi industry in Tallinn. The comparative research conducted for the PLUS project highlighted that Tallinn – when compared to the six European cities of Barcelona, Berlin, Bologna, Lisbon, London and Paris – stands out as the least regulated when it comes to platform work (Altenried et al., 2021). Our current analysis sheds light on the reasons behind this, and also shows how this impacts the livelihoods of platform labour.

Several analyses that open up the Estonian context of the platform economy are available, for example, by focusing on the “sharing economy” in particular or on the future of work more generally, especially those written from the legal/macroeconomic point of view (e.g., Eljas-Taal et al., 2016; Erikson & Rosin, 2018; Holts, 2018; Vallistu et al., 2017; Vallistu, 2018a). Furthermore, a few survey-based quantitative reports that depict and analyse the group of platform workers also exist (Huws et al., 2019; Vallistu & Piirits, 2021). Our analysis, however, focuses on the different perspectives of both stakeholders and workers in the platform economy and platform taxi driving. By studying the topics of working conditions, social security, and skills, we aim to understand *what it is like to work for a platform in a loosely regulated market situation*, including how people can experience it differently depending on their position, worldview and identity.

The focus on studying working conditions, skills and social security derives from the fact that these are the aspects that platform work has had a considerable impact on. The logic of how (lean) platforms operate regarding their workers directly aims to change the traditional functioning of the employee-employer relationship; platform workers themselves are responsible for making sure they are earning a living wage, providing themselves social security coverage, and making sure they are competent enough to safely provide the services. However, thus far, not much research on these aspects has been conducted in Estonia, and the current analysis aims to address this gap.

By studying these issues, we also aim to contribute to several ongoing policy debates both at the national and European level. As platform work poses considerable challenges to the European Pillar of Social Rights (European Commission, 2021a; Kampouri & Walsh, 2021) – a guiding document promoting decent working conditions – the European Union has started to propose policy initiatives for bringing platform work in line with it. Most importantly, in February 2021, the European Commission launched a consultation process with European social partners on the issues of improving the working conditions and social protection of platform workers (European Commission, 2021b). This process will end in a possible legislative instrument that might become applicable to the national labour markets as well. Therefore, it is important to understand the

current functioning of platform-based work and both the positive and negative sides it might pose to actors involved in it.

The empirical research our results are based on includes secondary literature, available statistics, expert interviews conducted between 2019 and 2021 (both individual and focus groups with researchers, policymakers, enforcement agents, labour representatives, taxi company representatives). This has helped us map the institutional setting influencing the ride-hailing/taxi industry. In addition, we highlight the perspectives of platform workers, more precisely that of platform taxi drivers, with whom we conducted individual in-depth interviews and one focus group interview. The topics discussed included working conditions and labour processes, their social security situation and what kinds of skills are necessary for this line of work and how platform taxi driving impacts skill development. The **individual interviews** (15) were conducted between November 2019 and March 2020, thus before the Covid-19 pandemic became prominent. To gain an understanding of workers' experiences during the pandemic, we also concluded a **focus group interview** on 6 November 2020. It comprised four participants, representing 2 types of platforms (namely Uber/Bolt and Airbnb).

Platforms entered Tallinn's taxi industry in the mid-2010s, with the Estonian Taxify (now Bolt) leading the way in 2013, followed by Uber in 2015. Initially, "ride-sharing" as a service was not regulated and thus providing it was much more cost-efficient than providing regular taxi services (where licences etc. were mandatory). Although taxi companies started using applications in providing their services already before Uber and Bolt entered the market, the latter players have been more successful in gaining market share, and also developing other app-based services like food delivery. Taxi platforms started by engaging in price-dumping, providing services with lower prices than traditional taxi companies, leading to the **lowering of prices**, as well as remuneration for providing taxi services, on the one hand, and making the taxi service more attractive/affordable to new customer groups, thus **expanding the market** (until the Covid-19 pandemic), on the other.

De-regulation of the taxi industry due to the inclusion of ride-hailing as a taxi service at the end of 2017 has also had a considerable impact on the sector, including lowering the barriers to becoming a taxi driver and also causing a **de-professionalisation of the job**. On the other hand, there are still some regulations that are applicable to traditional taxis, but not platform-based taxis, and control activities are difficult if not impossible to conduct on platform taxis. This, in effect, caused unfair competition and made the sector also more insecure and prone to a grey economy.

Important impacts of the platformisation of the industry on the working lives of platform taxi drivers include the following. First, although the traditional taxi sector has relied mostly on (false) self-employment (own-account workers) when hiring taxi drivers (e.g. taxi services are provided via a one-person company who signs a contract with a larger one), and companies do not provide employment contracts to drivers, platforms introduced a new practice that made the situation more precarious: working as a natural person without any kind of contract with the platform. Therefore, platform taxi drivers are totally responsible for covering their own taxes and social security payments. This can lead to tax avoidance and a lack of social security. Second, operating under (non-transparent) **algorithmic management** (often for multiple apps simultaneously) has its own specific qualities. Although arguably you should be your own boss, in practice you have

to conform to platform standards (that drivers have no say over), otherwise you might even get blocked by the algorithm without due process. In addition, your flexibility as a driver is limited by existing bonus systems and available clients.

Unlike many other European cities, **collective organization against platforms has been relatively modest** and no worker cooperatives/ community-owned platforms exist. The reasons why collective mobilisation seems unfruitful to the interviewees relate to the huge pool of available drivers, general (perceived) weakness of trade unions in Estonia, and the possibility of being blocked by the app if drivers “act out”. Generally, it seems that both individual and collective **agency is constrained by the (perceived) control the taxi-apps exercise over the drivers**. The pandemic seems to have made these tendencies even more intense, as competition among drivers has increased.

How the current situation is perceived by different actors, including platform taxi drivers, however, is rather multifaceted – depending, for example, on the reason this line of work is chosen (or was there really a choice), if it is the main income source or an additional one, and what kind of values/identity the person has. Regarding important differences, we encountered both drivers who considered taxi apps to be *de facto* employers (who should be given more responsibility) on the one hand, and those who saw platforms as the ultimate expression of the free market, and thought the situation should be even less regulated.

However, in general, **Estonian society tends to be techno-optimistic and have trust in the free market** (e.g., European citizen's ..., 2021; Lanamäki & Tuvikene, 2021), and this was also the case with our interviewees. Peoples' work and life in general are becoming more and more intertwined with technology, and Estonia has the image of being technologically progressive, especially in the fields of information technology and e-services. Innovative technological solutions and related know-how developed here are acknowledged and sometimes exported worldwide, but the aforementioned image is even more shared and popular inside the country. The discourse of Estonia being a “little but smart country” is frequently used by local politicians, entrepreneurs, educational institutions and the media. Therefore, it has become the basis and explanation for several political decisions – including the deregulation of the taxi industry – and functions sort of as a narrative for national identity.

That in turn could partly explain why some interviewees warmly welcome and praise Uber, Bolt and others, and emphasise the possibilities these platforms offer them. In addition, trust and a belief that platforms know better seems to be connected with these tendencies. Those who have a more negative attitude towards platforms, nevertheless, display a prevailing acquiescence; in other words, a feeling that there is nothing much to do and the only way is to accept the technological changes and algorithmic control in one's life. Although some interviewees perceived the management strategies of the platform to be somewhat constraining and to generate precariousness, most of them mentioned that this kind of work offers them freedom. That fact can also be connected with local mentalities. Namely, after gaining re-independence from the Soviet Union, Estonia has firmly chosen the road of a liberal market economy. This course is vividly expressed in a slogan “return to the West” which affirms Estonia's wish to dissociate itself from anything considered socialist or overtly left-wing (Helemäe & Saar, 2015; Lauristin, 2003). Therefore, the idea of the free market and the aspect of individual choice is seen in a particularly positive light. As the interviews indicate, being able to be, so to speak, your own

boss (switch application on or off whenever one pleases) is felt to go inevitably hand in hand with deregulation; that is, keeping the government from intervening in the platform business models.

Furthermore, although **platforms** like Uber and Bolt **collect huge amounts of data** from drivers and riders (to use as competitive advantage in the services market, but also for building alternative services and infrastructure), in Estonia this is not really problematized either by experts or the drivers themselves. Nevertheless, in Europe and elsewhere at the academic, activist and policy levels, multiple issues regarding data collection, especially privacy concerns, but also concentration of capital and monopolisation of certain services, have been highlighted (see, e.g., Booth, 2020; Monahan, 2020; Srnicek, 2017; Zhao et al., 2019).

In conclusion, taxi platforms have had a considerable impact on the industry and on the profession of taxi drivers, including lowering service prices (as well as remuneration for providing the taxi service), setting in motion the deregulation of the industry and causing a de-professionalization and loss of job security. These tendencies, however, have been generally accepted or even celebrated in Estonian society, without much resistance and elaboration on the possible negative side-effects these developments can entail for the workers. Besides revealing Estonia's contextual forces and local discourses, the interviews show us their negative impact. On several occasions, the same interviewees who expressed sympathy towards the freedom that platforms give them, also spoke about – in addition to the already mentioned aspects like the feeling of being controlled by the app and additional precariousness – low wages and the lack of social guarantees. Therefore, unregulated technological and entrepreneurial ambition leave their mark on workers' well-being rather directly. At the same time, the popularity of such ambition often inhibits workers to recognize that. Hence, it is clear that Estonia's overall (neo)liberal and techno-optimistic mentality provides workers with narrative resources (Gubrium & Holstein, 2008); that is, topics and ways of talking and thinking that are presumed to be legitimate and appropriate when discussing and framing the situation they find themselves in. Instead of drawing connections between the negative side of their working conditions and the dominant economic ideas, many interviewees saw these two as separate things and talked positively about the latter.

Negative aspects that need to be tackled by a platform taxi driver daily can be divided into three types: those related to coping with the poor image of an app-driver (one needs to do identity work to overcome this); those related to coping with high-intensity competition and low prices; and those related to coping with regular inherent dangers in this kind of job (danger from traffic, customers, or *greedy apps*, is dealt with by being calm, patient, using good self-control, and, ultimately, by turning down offers). Therefore, the drivers do not encourage seeing this as “easy money” – it can be precarious, dangerous, there is a risk of overwork, and there are problems with clients. Once a driver can deal with the challenges, among the **positive aspects** there is the possibility to work in a field that has always been of interest; to work a schedule that is most suitable; to prove yourself as an entrepreneur; to meet interesting people; and a chance to “get lucky” (e.g. to find a (real) job). For some, the negative effects of taxi-apps are stronger than the positive, and they search for a professional full-time job so they can quit. However, no one, even among the most optimistic, sees the app as leading to a career path, and it is rather portrayed as a dead-end job that does not contribute to their professional CV in positive ways. At the same time, it is difficult to find a professional job while driving, but the skills and degrees may lose their

competitive advantage during this period. There is also uncertainty related to the present day and the ability to cope with uncertainty thus is very important.

INTRODUCTION

The impact of digital platforms and the accompanying platformisation of parts of the economy are increasingly important topics for understanding current developments in capitalism, including how these influence the working lives of a growing number of people. Although terminological ambiguity exists, at the general level digital/online platforms can be defined as “digital infrastructure that enable two or more groups to interact”, bringing together different users, like service providers and customers (Srnicek, 2017, p. 43). The current report focuses on a specific type of digital platforms, namely lean platforms: platforms that own software and data analytics, but have outsourced other aspects of their business: workers, fixed assets, training etc. (Srnicek, 2017). In the case of Uber and Bolt, for example, workers (i.e. drivers) are themselves responsible for their employment, training, social security and working conditions.

Platform work¹ can be defined as “the matching of the supply of and demand for paid work through an online platform”. We will focus on the more specific type of work, namely on-location (as opposed to online) platform work that is delivered in person (Eurofound, 2018, p. 1), as driving the taxi via the platform would fall under this category. Sometimes it is also referred to as ride-sharing (and the platform economy as the sharing economy), but as market relations dominate and not all drivers actually use their own car, but rather rent one, the “sharing” aspect seems not to be the central element for this line of work, and can be misleading. Furthermore, taxi platforms exercise quite a lot of control over their drivers (Maffie, 2020). Therefore, we prefer to use the term ride-hailing, or indicate that a person is driving a platform taxi.

Several analyses are available that open up the Estonian platform economy context by focusing on the “sharing economy” in particular or on the future of work more generally, especially those written from the legal/macroeconomic point of view (e.g., Eljas-Taal et al., 2016; Erikson & Rosin, 2018; Holts, 2018; Vallistu et al., 2017; Vallistu, 2018a). Furthermore, a few survey-based quantitative reports that depict and analyse the group of platform workers also exist (Huws et al., 2019; Vallistu & Piirits, 2021). Our analysis, however, focuses on the different perspectives of both stakeholders and workers in the platform economy (specifically platform taxi driving). By studying the topics of working conditions, social security and skills, we aim to understand *what it is like to work for a platform in a loosely regulated market situation*, including how people can experience it differently depending on their position, worldview and identity.

The focus on studying working conditions, skills and social security derives from the fact that these are the aspects that platform work has had a considerable impact on. The logic of how (lean) platforms operate regarding their workers directly aims to change the traditional functioning of the employee-employer relationship; platform workers themselves are responsible for making sure they are earning a living wage, providing themselves social security coverage, and making sure they are competent enough to safely provide the services. However, thus far, not much research on these aspects has been conducted in Estonia and the current analysis aims to address this gap.

¹ Sometimes also called work in the sharing economy, gig work, crowd work or on-demand work.

By studying these issues, we aim also to contribute to several ongoing policy debates both at the national and European level. As platform work poses considerable challenges to the European Pillar of Social Rights (European Commission, 2021a; Kampouri & Walsh, 2021) – a guiding document promoting decent working conditions – the European Union has started to propose policy initiatives for bringing platform work in line with it. Most importantly, in February 2021, the European Commission launched a consultation process with European social partners on the issues of improving the working conditions and social protection of platform workers (European Commission, 2021b). This process will end in a possible legislative instrument that might also become applicable to the national labour markets. Therefore, it is important to understand the current functioning of platform-based work and both the positive and negative sides it might pose for the actors involved in it.

The first part of the report is dedicated to the institutional setting that influences the ride-hailing/taxi industry. It is based on secondary literature, available statistics and expert interviews conducted in 2019 with key stakeholders, including experts in the field of social security, taxation, public transport, and platform work in general. In the later stage of the project we also conducted two group interviews (one in November 2020 focusing on platform work in general and the other in March 2021 focusing on the taxi industry) with different stakeholders (researchers, policymakers, enforcement agents, labour representatives, taxi company representatives) to further elaborate the developments in the field, including discuss how the Covid-19 pandemic has affected the situation of platform work and workers, and elaborate on possible policy changes that might be necessary to enhance the situation of platform workers.

The second part of the report is devoted to the perspectives of platform workers, more precisely that of platform taxi drivers. Although we specifically targeted Uber drivers, they mostly also used other taxi applications (especially Bolt) for providing their services, making their experiences with taxi platforms wider than just Uber. The main topics that were covered during the interviews were related to working conditions and labour process, social security and skills. The fifteen individual interviews were conducted between November 2019 and March 2020, thus before the Covid-19 pandemic became prominent. To gain an understanding of workers' experiences during the pandemic, we also concluded a focus group interview on 6 November 2020.

METHODOLOGY

This report is based on empirical research conducted in Tallinn between 2019 and 2021 for a European Union-funded project *Platform Labour in Urban Spaces: Fairness, Welfare, Development* (PLUS). The project aimed to map the situation and changes in the platform economy in general and in the ride-hailing/taxi industry and accommodation/hospitality sector in particular. The current report focuses on the ride-hailing/taxi industry in Tallinn.

The first part of the report is dedicated to the institutional setting that influences the ride-hailing/taxi industry. It is based on **secondary literature and available statistics** – including publicly available state administrative statistics, survey data, newspaper articles, research reports/articles, legislation (acts), and homepages of some relevant companies/organisations. Furthermore, we conducted five semi-structured face-to-face and three e-mail **interviews** (conducted between 2019 and 2021) **with key stakeholders**, including experts in the field of social security, taxation, public transport, labour rights and platform work in general. The main aim of expert interviews was to elaborate on the role and impact of platforms. The face-to-face interviews lasted between 25 to 60 minutes. In the later stage of the project, we also conducted two **group interviews** – one in November 2020 focusing on platform work in general and the other in March 2021 focusing on the taxi industry in particular – with different stakeholders (researchers, policy makers, enforcement agents, labour representatives, taxi company representatives). These lasted 87 and 107 minutes respectively, and aimed to further elaborate on the developments in the field, including how the Covid-19 pandemic has affected platform work and workers, and to elaborate on possible policy changes that might be necessary to enhance the situation for platform workers.

The second part of the report is devoted to the perspectives of platform workers, more precisely that of platform taxi drivers. Although due to project specifics we targeted Uber drivers, they mostly also used other taxi applications (especially Bolt) for providing their services, making their experience with taxi platforms wider than just Uber. The main topics that were covered during the interviews were related to working conditions and labour processes, social security and skills. The **individual interviews** (15) were conducted between November 2019 and March 2020, thus before the Covid-19 pandemic became prominent. To gain an understanding of workers' experiences during the pandemic, we also concluded a **focus group interview** on 6 November 2020. It comprised four participants, representing 2 types of platforms (namely Uber/Bolt and Airbnb). All participants had experienced platform work during pre-pandemic times as well as during the pandemic.

Individual in-depth interviews with platform taxi drivers

To find Uber drivers who would be willing to give an interview, a variety of strategies were employed. There was an attempt at convenience sampling, when two of our team members rode with Uber and recruited four people this way – this strategy seemed to be rather difficult, as many declined to be interviewed. In addition, access was sought through institutional settings, as we posted a call for participation in two of the Uber drivers' Facebook groups (one group is in English and one in Estonian) and also advertised during a few classes at Tallinn University – this strategy brought us eight interviewees. Finally, a snowballing design was applied, as we also used personal contacts and recruited two acquaintances through this method. One of the interviewees was

found by asking relevant contacts from another interviewee. There were also a few cancellations; these occurred with people we found via riding with Uber, and their excuse was not having enough time (even when they initially agreed to be interviewed). This indicates that our sample might be inclined toward the group of drivers who were not struggling the hardest to make ends meet.

Our aim was to have as varied a sample as possible at least regarding age, gender, nationality (mother tongue), educational level, experience driving a traditional taxi and work situation. While considering some of these characteristics (age, experience driving a traditional taxi and work situation), the final pool of interviewees was indeed rather diverse, men (13 out of 15), people with higher education (10 out of 15) and Estonians (whose mother tongue is also Estonian, 11 out of 15) were clearly over-represented (see Table 1).

Table 1: Characteristics of the interviewed Uber drivers

		Number of interviewees
Sex	Male	13
	Female	2
Age group	Below 30	5
	30–50	7
	Over 50	3
Nationality/majority/ minority	Estonian	11
	Estonian-Russian	2
	New immigrants	2
Education level	Secondary	5
	Higher	10
Monthly working hours on all platforms	Up to 40	2
	40–100	4
	More than 100	9
Main source of income	Uber	1
	Regular employment	5
	Multiple taxi platforms	5
	Own company (not taxi)	3
	Pension/scholarship/other allowances	1
Basis for social security	Platform labour	1
	Other	12
	None	2*

Source: own calculations

*Note: * One person was not clear about their social security status. They mentioned that they pay only income tax from Uber-earnings, but sometimes they also pay wages through their own company to provide health insurance (but not pension insurance).*

The age ranged from 24–66 years and some of the interviewees had previously driven traditional taxis, some still did that as well, and some had no experience of it. **There were no respondents for whom Uber was the only source of income, most of them combined Uber with other taxi platforms.** In Tallinn working only for Uber does not seem to be a viable strategy, as Uber does not have a lot of work to provide. Some interviewees were also employed outside the taxi industry, using Uber as an additional income source. The number of hours worked for Uber also ranged considerably (from 3 to 70 per week), but not all could make a clear separation between working for Uber and for other platforms, as when multi-apping, people often have several applications open in parallel while waiting for clients and the amount worked for one or the other app changed

from week to week, depending on several external factors, such as seasonality, but also the agency of the drivers choosing the platform based on available bonus systems. As the Uber sample was quite diverse, we were able to gain insight into different reasons people had for doing this line of work, understand varying experiences with the app and clients, and gain insight into the different expectations workers can have towards platforms.

Our sample shows the **diversity of the population** of the drivers: there are those from the generally most privileged socio-demographic group – male, with Estonian as their first language – but there are also women drivers, those from an ethnic minority with Estonian as their second language, and recent immigrants. Migrants mostly claimed to be occupied with other apps, less with Uber as entry barriers are higher with Uber. The ages of the drivers we interviewed vary from 24 to 66 years, but with some gaps in certain decades: six are in the age group 24–31, seven in the age group of 40–51, and two beyond 60. This seems to be an important differentiator of what the driver's motivation for driving is, but not that much when their experience as a whole is concerned.

We can assume that the self-selection of the study made it more likely that nearly all the study participants are from the **dominant social group** (men, Estonian speakers) who might have been a more advantaged group among drivers as they could afford the time to be interviewed and were more reflective towards the platformisation of the taxi industry. We succeeded in interviewing Estonian-Russians and new immigrants, but it is possible that we still missed enough interviews to cover the whole spectrum of different social groups, especially those who do not speak either Estonian, Russian or English.

The women in our sample did not report many gender-specific difficulties, such as harassment, but this may come from a background of *low expectations* – as one of the women drivers put it, she often gets asked if it is safe for women to drive a taxi, but she feels that Uber clients are *generally* decent and *very rarely* have there been some *unpleasant situations* and she is *not worried*. This means that she has had *some* unpleasant situations, and this may explain why in general women are relatively underrepresented in the less-regulated ride-hailing business: there is the expectancy that this is less safe for them, and also there are some occasions that may make those who consider this too worried to continue. The other just stated that she does not feel more threatened by the clients because she is a woman, alluding that this business is inherently somewhat more dangerous. It is maybe important to point out here that both of the female drivers in our sample belong to the medium age group, so they may already have varied experience with the matter and have been able to prepare their own strategies to respond or prevent these. On the other hand, their primary socialisation as well as socialisation into work contexts took place in the pre-me-too era and perhaps their cultural capital allows this risk to be seen as irrelevant.

Those with **recent migration background** in our sample were from third countries and were of visible minority. Our interviewees were not refugees or labour migrants but rather engaged in ride-hailing as a side activity parallel to their graduate studies. Still, they confirmed they had witnessed racially motivated insults addressing them and had even experienced violence.

All interviewees were able to choose the place and time that suited them for having the interview. Most of the interviews took place at the premises of Tallinn University. The rooms used for the interviews were spacious and quiet with no distractions, thereby creating a comfortable and

trusting atmosphere. One of the Uber interviews, however, took place at a café chosen by the respondent. This proved to be a more difficult environment because of the noise and surrounding people. However, the interviewee seemed to be comfortable enough and the recording quality was good. During the interview session, interviewees were offered refreshments and, as a thank-you, a gift card to the value of €20 was given after the interview. This also helped to make the interview more appealing and compensate them for their time. Generally, the interview situation was rather relaxed, and people seemed to be willing to discuss their experiences and opinions quite openly.

The length of the interviews varied between 48 to 119 minutes. A few of the Uber respondents seemed to be in a hurry during the interview (one had parked their car for only an hour, and a few said they had to hurry back to work). Some interviews, where respondents expressed dissatisfaction with their work situation, were mentally rather difficult for the interviewers. In a few cases, it also seemed that the interviewees were satisfied that finally someone is asking their opinion about platform work and related issues. The most uncomfortable topics for the interviewer (and sometimes it seemed also for interviewee) were topics related to family and social activism outside the taxi industry, as these seemed to be out of the main focus and thus too personal, whereas participants expected the interview to be about work-related matters. Some respondents were also vague regarding paying taxes, and that might be related to a lack of knowledge about tax issues, of them not being sure of the legality of their tax situation, or that they were engaged in semi-legal tax practices.

Focus group interview

An invitation to join the **focus group** was circulated amongst all Uber drivers who were previously interviewed. During the period preceding the interviews, the Estonian situation with Covid-19 still meant it was possible to organise face-to-face meetings, so the decision was made to use that opportunity. Having a face-to-face interview proved to be the right choice in terms of active engagement and positive group dynamics. However, as society experienced an increase in Covid-19 numbers during the days preceding the focus group session, there were some cancellations before the interview. Finally, the group consisted of 4 participants (3 Uber and 1 Airbnb), all the Uber drivers were also interviewed earlier, the Airbnb host was a new participant in the project. The interview was conducted within the premises of the university, with the moderation of the PLUS team members. The duration of the interview was 1 hour and 30 minutes.

The focus group guidelines were constructed with the aim of introducing the participants to the first results of the analysis of the interviews conducted in Tallinn, and to ask for additional reflections, comments and further experiences related to the topics. Some slides with the main results were prepared and presented to the participants as a stimulus for the discussion. After a short overview of the PLUS project aims and activities so far, the interviewees were provided with the initial research results for the key issues of the *labour process* and *social protection* for both platforms; the discussion on skills was postponed for the following training session. Time was also allocated to discuss *Covid-19 period experiences*. Since the group composition was dominated by Uber drivers, the focus group produced somewhat more information about Uber, especially for Covid-19 influences.

Analysis of the interviews

All interviews were recorded with the permission of the respondent and all interviewees signed an informed consent form that was introduced to them before the interview. There was no notable concern about the fact that interviews were recorded or about how the collected data are going to be used. The interviews were verbatim transcribed by a trusted subcontractor.

The analysis followed the principles of thematic analysis. The structure of the interview guide divided the discussion into three broad topics, namely labour process, skills, and social protection but we allowed people to freely reflect their perceptions and topics related to platform work important to them. The analytical summaries were compiled on all interviews, following the main research questions and aims of the PLUS project as the central themes. We applied the inductive approach keeping an open eye for unexpected topics, aspects and nuances from the interviews. Then, based on the analytical summaries as well as the interviews as raw data, the central themes found in the material were developed and structured into the report. The analytical findings in the report are supported by direct quotations from the interviews.

PART I: INSTITUTIONAL CONTEXT

1.1. Platformisation of the taxi industry: Competitive pressures and changing regulations

Digital platforms entered Tallinn's taxi industry in the mid-2010s, with the Estonian Taxify (now Bolt) leading the way as it started providing ride-hailing services in 2013, followed by Uber in 2015. Beyond these, other apps used in Tallinn to order taxis include Taxigo, Taxofon and Yandex.taxi, and the city is well covered by a more traditional taxi service network with more than 30 taxi companies offering services, which means the competition in the sector is rather fierce. In 2017, Taxify (now Bolt, the most popular taxi platform in Estonia) had the second biggest revenue (€2,619,703) among taxi companies in Estonia, Uber's was 533,426 euros (Kranich, 2018). Taxi platforms are widely used by the general population. According to a survey by Statistics Estonia in 2018, 25% of all internet users (aged 16–74) reported that they have 'used any website or app to arrange a transport service from another individual'. The percentage is higher among younger age groups, especially concerning ride-hailing (Statistics Estonia, 2021). Another survey conducted in 2018 indicates that in Tallinn, out of those who have used taxi services within the previous six months, 75% have used Taxify, 35% Uber and 31% Yandex.taxi (Kantar Emor, 2018).

A clear direction in Tallinn's taxi business has been the platformisation of services in general, as the use of applications through which clients can order a taxi (in parallel to calling on the phone) started happening already before platforms like Bolt and Uber came onto the market. However, no other taxi app has experienced the success that platforms like Uber and Bolt have, who have also started developing an app-based infrastructure for other, related services like food delivery, which requires considerable investment that traditional taxi companies are lacking: *'.../ companies like Uber and Bolt have a huge advantage because they have the possibility to lose billions [to develop something] without any hassle. We do not.'* (Tallinn taxi industry focus group, March 2021). Similarly, taxi platforms started providing services with considerably lower prices than traditional taxi companies (possibly to build their client base and secure their market position), leading to a downward spiral in service prices, as well as remuneration for providing taxi services.

Deregulation of the taxi industry

In several European countries (e.g. Germany, Portugal), specific regulations for providing taxi services via platforms have been established, such as the necessity to have some kind of (alternative) employment arrangement or status (Kampouri & Walsh, 2021). Usually, this has happened in relation to the collective mobilisation of platform workers, including workers taking matters to court. In Estonia, the taxi industry is the only sector that has been re-regulated due to the impact of platform work. Although the taxi industry in Tallinn was already relatively lightly regulated before platforms entered the market, their entrance still brought along further deregulation at the national level, related to the amendments to the Public Transport Act (Riigi Teataja, 2021a) applicable since the end of 2017.

The Act unified most requirements for traditional and platform-based taxis, loosening them for traditional taxis. For example, language and training requirements specifically applicable to taxi

drivers were eliminated. Before platform taxis entered the market, taxi driving was considered a regulated profession requiring specific knowledge and skills. In 2016, the requirements were described by interviewed taxi company representatives as involving compulsory training and obtaining a qualification certificate, but also a service provider card and licence to provide a taxi service (Võsoberg, 2016). State mandated driving schools were regularly providing additional vocational education and training courses for taxi drivers. Such dedicated courses lasted around 35 hours and usually included insights to a number of relevant fields.

In the beginning, Uber and other taxi platforms did not fall under any regulations, but since the amendments to the Public Transport Act, their drivers have to apply for a service provider card and a vehicle card granted by the city government following the same (now simplified) procedure as traditional taxi drivers. Although the amendments to the Public Transport Act unified most requirements for traditional and platform-based taxis, there are still some distinctions. Platform taxis do not have to have a taximeter, printer, printed price list, or an illuminated sign.² Furthermore, local municipalities can set local rules that can only be extended to traditional taxis (currently local governments cannot do that for platform taxis), including maximum prices for rides and the requirement to have less-polluting cars (Riigi Teataja, 2021b). These distinctions still create quite a lot of inequality between traditional versus platform taxis. For example, traditional taxis are not allowed to use dynamic pricing (where price depends on demand and can get quite high during peak periods) and platforms can, and some local municipalities (e.g. Tallinn) have set the upper price limit for taxis with taximeters. Furthermore, it is more difficult to monitor whether platform taxis follow the rules compared to traditional taxis (Tallinn taxi industry focus group, March 2021). These differences put traditional taxi companies in a disadvantageous position compared to platform taxis.

Currently, regular taxi companies advertise the driver's position to those who have at least 3 years of driving experience; fluency in the Estonian language and a working knowledge of Russian, Finnish and English; and agree to provide a formal, polite, customer friendly service (e.g. Tulika Takso, 2021). The relevance of languages might deserve a special mention here: the Public Transport Act (Riigi Teataja, 2021a) does not mention the need for any language skills in order to obtain the right to operate a taxi, and neither do local level regulations in Tallinn. However, according to the Estonian Language Act (2011) drivers of public transport vehicles are required to demonstrate knowledge of Estonian at the level B1, and as taxis are among public transport, this should apply to them. The Public Transport Act only sets requirements for good reputation, as defined by the absence of a poor track record or criminal record, and attaining of driving license. It appears then that by law, the one main requirement for drivers in general, as well as for taxi drivers and for ride sharers is a driver's licence.

Related to the changes in the law, an important development is the specific taxi insurance introduced by insurance companies after vehicle cards (mandatory for taxi drivers) became publicly available. Although insurance companies previously also wanted to know if the vehicle is used as a taxi, the insurance premium did not differ much. Currently, the difference is huge, as

² Public Transport Act: (2) Where the illuminated taxi sign has been installed on the vehicle and the name of the carrier or the carrier's trade mark enjoying protection for the purposes of § 5 of the Trade Marks Act or the trade mark granted use of to the carrier under a contract is visible on the outer right side of the vehicle, the passenger may be serviced from a taxi stop and the lane designated for public transport may be used upon provision of taxi services.

a taxi company representative explains: "...in extreme cases the car insurance payment for taxis can be 100 times higher" (Tallinn taxi industry focus group, March 2021). This is also an aspect that might push some drivers into the grey economy.

It was highlighted by the taxi industry focus group participants throughout the interview that the discrepancy between quite extensive control exercised over traditional taxi companies versus lack of control over platform taxis is *the* crucial issue that makes the situation in the industry so unfair (Tallinn taxi industry focus group, March 2021). A recent decision by the Supreme Court of Estonia (Riigikohus, 2021) stated that the Public Transport Act does not provide the possibility for authorities to order a taxi via a mobile app in order to monitor the driver (e.g. to see if their licences are in order). The court concluded that the current legislation does not provide any possibility to effectively monitor platform taxi drivers (see more from section 1.6 regarding the situation in Tallinn).

Another recent court decision (in the court of first instance) that might have an impact on the industry concerns Bolt. A person who ordered a taxi via the Bolt application got into an accident and received minor injuries. They sued Bolt as Bolt was the company who owned the licence to provide the taxi service that was related to the driver's service provider's card. The court ordered Bolt to pay damages (ERR, 2021a). The taxi company representative present in the focus group felt that the decision was unfair and taxi companies should not be responsible for their drivers' accidents. The representative was worried that this decision might put pressure on taxi companies to insure drivers against such lawsuits, but taxi companies do not have the finances for that (Tallinn taxi industry focus group, March 2021). As Bolt and the plaintiff reached a compromise, the decision did not enter into force (Riispapp, 2021).

1.2. Working conditions, labour standards and collective mobilisation

Next, we will highlight how the platformisation of the taxi industry relates to the changing working conditions – income, training, working time, safety at work and autonomy – for taxi drivers.³ Second, we will elaborate what kind of collective reactions taxi drivers have had to the changes in the business.

Our research suggests that as platform taxis entered the taxi business, the income of taxi drivers has stagnated compared to the rest of the economy. The market, however, has expanded (until Covid-19 hit), as new customer groups started using taxi services. Generally, the Estonian taxi industry has been and is a low-income industry, so much, indeed, that according to one taxi company representative (Tallinn taxi industry focus group, March 2021) it is not even possible to get decent compensation for your work if you declare all your income and pay taxes from that: accordingly, tax avoidance is written into the business model (not only regarding platforms, but traditional taxis as well). The constant supply of new drivers enhances the situation. What is also related to the entrance of platform taxis is that taxi drivers have started using multiple taxi companies and platforms simultaneously and, according to a representative of a taxi company, usually this is not restricted by the taxi companies (although some have non-competition clauses

³ Little is known about the actual number of workers taxi platforms have, or how much, on average, they work, earn and so on, as platforms do not share this information with public /state authorities.

with their drivers). This also raises the question of which taxi company can be held responsible for this driver's licences, security etc.

Taxi driver occupation has also changed in the sense of de-professionalization. A representative of a taxi company argued that very few taxi companies train their drivers at all (training was mandatory before the changes to the Public Transport Act, and now it is voluntary, see previous section). On the one hand, as an expert from the Tallinn Transport Department we interviewed in 2019 argued, ride-hailing introduced new and better taxi standards for customers. Service has become more comfortable, simple and accessible. There is more competition, so taxi companies try harder. He concluded that *"I do not see any negative aspects related to ridesharing. People [=clients] win."* (TA-EX-4, 2019). However, the impact of platforms may have been in two directions: first the quality of the service indeed increased, as new drivers and more competition came onto the market. But when Bolt started dominating the market (as it does now), it started to decrease, reaching maybe even worse levels than before. Now *"the situation is so that no self-respecting person will choose to drive a taxi. You go drive a taxi under Bolt when you are in trouble."* (Tallinn taxi industry focus group, March 2021). The diversity of drivers has also increased. According to one representative of a taxi company, Bolt's dominance is clear and other taxi companies have had to considerably decrease the number of taxis they operate and the taxi drivers they have.

The high level of flexibility and autonomy are the main issues that are emphasised in relation to the essence of platform work – be it in the media, by the experts we have interviewed during the PLUS project or by the workers themselves. Combining platform work with other work/study/private life obligations is an important reason why some people choose this line of work. However, some workers and experts have raised doubts about whether the autonomy and flexibility that the apps arguably provide – including setting your own working time – can be realized (especially after the pandemic hit). First, platforms provide clients, set rates, sanction non-compliance and more, and second, if you want to earn decent money, you have to be active during specific times, and so the schedule is not actually so flexible.

The job might have also become more unsafe. Regarding health and safety at work, providing this mostly falls on the workers themselves, as health and safety regulations are the responsibility of the employer / service provider (Riigi Teataja, 2021c). According to the statistics of the Estonian Motor Insurance Bureau, in 2019 taxis that are operated via an application caused 1.8 times more traffic accidents than traditional taxis, and seven times more than regular cars (Eesti Liikluskindlustuse Fond, 2020). The focus group participants highlighted that this might partly be because platform taxi drivers spend more hours in the traffic, so obviously have a higher chance of getting into an accident. A Municipal Police (MUPO) representative also elaborated that platform taxi drivers often have their "eyes on the app", so they pay less attention to the traffic. In addition, as platforms sometimes offer bonuses for faster/more rides, drivers might hurry in the traffic.

Unlike many other European cities, **collective organization against platforms is relatively modest** and no worker cooperatives/ community-owned platforms exist. When taxi platforms entered the taxi industry and were not regulated at all, both taxi drivers and taxi companies addressed the unequal situation in the media, and with policymakers and politicians. The main heated debates took place when the changes in the Public Transport Act were discussed (in 2016) at the

state level. Traditional taxi companies and taxi drivers (Estonian Taxi Companies Association, Association of Car Companies, and Estonian Taxi Drivers Association) demanded the equal treatment of platform taxi services and regular taxis. The Estonian Taxi Drivers Association (Eesti Taksojuhtide Liit) argued that the activities of Uber and Taxify should not be legalized. There were public debates in the mass media, but also a demonstration in front of the Parliament. On the other hand, the platform companies (including Taxify) established the Estonian Sharing Economy Association (Eesti Jagamismajanduse Liit) to promote this line of economic activity (Elijas-Taal et al., 2016).

In January 2018, Taxify (now Bolt) drivers gathered in front of the Taxify office to demonstrate against the platform's new *dynamic* price policy – meaning that in the area where there are a lot of clients the prices will be higher/doubled, but otherwise the price will be low. According to the protesting drivers, that would have decreased their income by 30%. According to one Taxify driver, those who rented the car from Taxify were in the worst position, as they had to pay rent to Taxify and were obliged to accept mandatory rides. In order to earn enough to pay the rent, they would have needed to accept 100 rides per week (70–80 hours) (Pärgma, 2018). However, the protests did not lead to any tangible outcomes and in 2020 Bolt was still using dynamic pricing.

There exist no specific unions for platform workers and traditional unions have also been rather reluctant to mobilise them. In addition, in sectors like the taxi industry, unionisation is very low in general. As platform workers are not employees (see section 1.3), there are also legal challenges for unionisation. Representatives of the Estonian Taxi Companies Association (Eesti Taksoettevõtete Liit) have been of the opinion that Uber and other taxi platforms should be considered as regular taxi companies, and thus their drivers should have either employment contracts or they should be entrepreneurs (not work as private individuals) (Kalev, 2018). It is important to understand that in the Estonian taxi industry, employment contracts did not prevail before platform taxis entered the market and for most taxi companies their drivers are own-account workers.⁴ A recently established community organisation called Estonian Taxi Association (Eesti Taksokoondis, representing the interests of taxi drivers) has expressed clear dissatisfaction – mainly in social media – with the current situation and has also highlighted that taxi platforms should be considered regular taxi companies (Eesti Taksokoondis, 2021).

1.3. Employment status and tax compliance

Regarding the changes (or lack thereof) in the employment situation for taxi drivers in Estonia, it is crucial to understand that the taxi industry was lightly regulated (compared to other European countries) already before platform taxis came onto the market (Tallinn taxi industry focus group March 2021). For example, in Estonia even one-man companies can have taxi licences. Most importantly, traditional taxi companies are not providing (and usually have not provided) the

⁴ Own-account workers are those who are "working on their own account or with one or more partners, hold the type of job defined as self-employed, and have not engaged, on a continuous basis, any employees to work for them" (ILO, 2003).

possibility to be employed as a taxi driver. Rather, when hiring taxi drivers the sector has used a model of (false) self-employment (own-account workers) for a long time.

Platforms in Estonia can sign different types of contracts with their workers. Few (Wolt, GoWorkaBit) offer the possibility to sign a service contract (authorisation agreement) between them and the workers based on the Law of Obligations Act (*Võlaõigusseadus, käsundusleping*), not based on the Employment Contracts Act. Taxi platforms, however, do not provide employment or even service contracts to their drivers. Similarly, platforms have no obligation to provide work for the drivers who are paid only when they have provided a concrete service to a customer, out of which a part goes to the platform. Therefore, in regard to platform taxi driving, we really cannot talk about having any amount of job security. This became painfully evident during the pandemic, when the taxi industry was hit quite hard.

Legally, platform workers operating via Uber, Bolt or other taxi platforms fall either under the status of sole proprietors (self-employed persons), work through their own small company (either paying social security tax for themselves or not) or provide services as natural persons who declare taxes (if at all) as occasional income or through a newly established business account for natural persons (see Table 2). In case of the first two options – sole proprietors (self-employed persons) or working through their own small company – they can pay their own labour taxes and also get social security coverage. However, this makes earning opportunities very low and as it is clear from the interviews we conducted for this project, rarely happens. From occasional income, only income tax is paid, which does not provide social security. In the sample of drivers we interviewed for the PLUS project, the most dominant relational status with the platforms was that of a natural person who declares taxes as occasional income (one did it also through a newly established business account for natural persons). Few were self-employed and few provided services via their own company.

Table 2: Variety of statuses, tax obligations and social security situations of platform taxi drivers

Status	Tax obligations	Social security coverage
Private individual declaring occasional income via tax return	Income tax	No
Private individual using entrepreneur account	Tax rate is 20% if the annual receipt is up to 25,000 euros and 40% if the annual receipt exceeds 25,000 euros. The rate covers income tax, social tax and contributions to mandatory funded pension.	Yes, if the sum is continuous and above the mandatory threshold.
Sole proprietors (<i>FIE</i>)	Have to pay income tax and social tax, and also contributions to mandatory funded pension in case they have joined the mandatory funded pension system from their profit.	Yes, if the sum is continuous and above the mandatory threshold.
Private limited company (<i>OÜ</i>)	Labour taxes need to be paid on income from employment: income tax, social tax,	Yes, if the sum is continuous and above the mandatory threshold.

	unemployment insurance premiums and in case the driver has joined the mandatory funded pension system then also contributions to mandatory funded pension.	
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Source: <https://www.emta.ee/en/private-client/muud-tulu-liigid>

This kind of legal situation, where platform workers are not considered by platforms as employees or even someone who should have service contracts with platforms, is also accepted by state authorities. The debate in public regarding the rights and obligations of platforms towards their workers is a bit more mixed, yet modest. Some trade unions highlight that taxi platforms can be considered as employers, and the representatives of the traditional industry have suggested that platforms should operate under the same rules and regulations as they are (E-mail interview with the representative of EAKL, 2021; Kalev, 2018).

Still, the fact that platforms like Uber do not provide employment contracts for their drivers has not had as huge a disruptive impact on the taxi industry as it probably has in some other countries. In Estonia, most “traditional” taxi services also do not employ taxi drivers, but drivers are either self-employed or working through their own company. Therefore, the relationship between drivers and traditional taxi companies versus ride hailing platforms like Uber does not differ hugely. A representative of a taxi company explained that if a company would actually hire taxi drivers, they would be in a clearly disadvantageous position in the market, as happened with one of the biggest taxi companies:

They [the taxi company] initially hired all the taxi drivers, produced... I don't know, like several million of kroons [previous currency] of losses every year until they realised that this model does not work. And they started using the same model as all the rest. This [the model] means that the taxi driver is a private entrepreneur, typically either renting or owning the car and offering the service as (s)he pleases. So in that sense there has not been any important change. (Tallinn taxi industry focus group, March 2021)

This means that the employment conditions for taxi drivers have been largely dependent on themselves already for a long time and to some extent on specific agreements with the companies they provide the service for. It was also highlighted during the taxi industry focus group that the usual practice among taxi drivers seems to be to pay only the minimum amount as a salary to receive social security coverage and not pay taxes on the rest of their income, so the grey economy has long been part of Tallinn's taxi industry.

What did change with the entrance of platforms, however, is that **platforms normalised the process of taxi driving as a source of occasional income without providing an employment contract to them**⁵ as opposed to registered self-employment used by traditional taxi companies. The grey

⁵ When natural persons work through platforms they might declare their income from driving as occasional income and pay only income tax from it or pay the taxes through the new option of the Simplified Business Income Taxation Act, which sets a lower level of tax obligations, but when fulfilling certain requirements, a person may also receive social security through that.

economy increased further as more drivers are not paying taxes at all. It is also extremely difficult and energy inefficient to monitor the taxi drivers for tax avoidance:

I have spoken to a tax official once who tried to carry out tax inspections in the taxi industry. (S)he said they spent two kroons to find one. This means they cannot in any way monitor sole proprietors' [type of registered self-employment in Estonia] when it comes to taxes, so actually no control was exercised. This means taxi drivers always declare the minimum wage...tax expense. This means they pay the necessary minimum social tax to get social insurance. (Tallinn taxi industry focus group, March 2021)

Due to the lack of tax compliance, the platform economy has forced the state tax authorities to **revise the tax collecting system**. Interestingly, in Estonia, this has been done with the cooperation of the platforms. In 2015, the Estonian Tax and Customs Board (ETCB) started cooperation with Uber and Bolt to establish a system to simplify the declaration of taxes related to earnings through the platforms: drivers have the option to declare their income through a prefilled form provided by the ETCB through the platform, and platforms then send the information to the ETCB. However, it is not mandatory for the drivers to share this information and generally very little is known about platform workers (numbers, income, hours worked etc.), as the platforms are rather non-transparent and do not share the data.

Furthermore, in 2018, the Simplified Business Income Taxation Act was passed with the aim of simplifying tax responsibilities for natural persons. The act stipulated that the rate of business income tax is: 1) 20% of the amount received on the business account if the amount does not exceed 25,000 euros in a calendar year; 2) 40% of the amount received on the business account exceeding 25,000 euros in a calendar year. The rates include both income and social taxes, which are low compared to the regular Estonian employment tax rate of over 50%. The taxes can be paid through the newly established entrepreneur account. Therefore, the platform economy has introduced changes in the Estonian tax system.

1.4. Social protection

Between 2005 and 2018, Estonia was among the European countries with a relatively low level of expenditure on social welfare in the areas of labour market policy (approximately half of the EU28 average), social protection (67% of the EU28 average), social exclusion (25% of the EU28 average) and old age provision (67% of the EU28 average). Child and family policies have been approximately 40% above the EU28 average (Unt et al., 2021). Estonia also has a minimum salary which lags behind most of the other EU countries – only Latvia and Bulgaria have lower purchasing power parities of their minimum salary (Hankewitz, 2020).

The access to social protection in Estonia is earnings related; therefore, contribution-based and depends on whether a person has paid enough social security contributions (and for long enough). For all those who have an employment contract there is insurance coverage as even in the case of part-time work, the minimum amount of social tax is requested from employers. The insurance cover will be suspended two months after the date of the suspension of work entered in the employment register (e.g., an employee enters active service, goes on parental leave, etc.). The insurance cover will not be suspended in the case of unpaid leave granted by agreement of the parties, provided that social tax is paid for the person at least to the extent of the monthly rate

of social tax. In 2021, the monthly rate on which social tax liability of based is 584 euros and thus the minimum amount of social tax is 192.72 euros per month.

There are other ways to be eligible for social protection covered by the state like being officially registered as unemployed (for a full list of those eligible for social protection by the state, see Eesti Haigekassa, 2021a). Unemployed can apply for unemployment insurance benefit (UIB), which is more generous and related to the previous salary level or for unemployment allowance (in the case of no sufficient prior work experience). From 1 September 2020, it is possible to work up to 8 days a month, with the maximum sum of 233.60 euros (gig work or any other form of work) and still be officially registered as unemployed with full rights, including social insurance coverage. In addition, the eligibility for unemployment insurance benefits was relaxed to promote seasonal work. Nevertheless, the employment has to be on the basis of an employment contract/contract under the law of obligations or civil service (Eesti Töötukassa, 2020a). As taxi platforms do not offer these options, the system is not applicable for working under these platforms. Self-employed can register as unemployed if they stop their self-employed status.

The regulation of insurance cover differs if a person works on contract under the law of obligations, which is the usual contract if the platform has a contract with an individual. In order to qualify for health insurance coverage, social tax must be declared either in the tax form of one employer or several employers in the monthly total amount of at least the minimum social tax obligation. However, an important difference between people working under an employment contract from those working under a law of obligations contract is that the insurance coverage of an insured person is suspended after one month has passed from the due date where according to the information received from the Tax and Customs Board social tax has not been declared to the extent of the minimum social tax obligation in the latter case (not after two months as is the case with an employment contract).

Considering sickness benefits, employees working under an employment contract are in an advantaged situation, as in general individuals working as self-employed or under the law of obligations will receive compensation only from the ninth day of incapacity:

“In case of illness, quarantine, non-work and traffic injury and the complications or illnesses caused by it, the benefit is paid by the employer from day 4 to day 8. Since day 9, the benefit is paid by the Health Insurance Fund. In other cases (occupational disease, occupational accident (incl. traffic-related occupational accident and complications or illness caused as a result of an occupational accident), injuries caused as a result of protecting national or public interests and preventing a criminal offence), the benefit is paid only by the Health Insurance Fund and from the second day of the exemption from work.

Furthermore, the benefit is paid by the Health Insurance Fund as of the second day if the reason for the certificate of incapacity of work is the provision of work corresponding to the person's state of health and transferring the person to a less strenuous position, or if the employer does not have work suitable for a pregnant woman. If the employer does have less strenuous work that the employee could do during the period of incapacity for work caused by the above, then the Health Insurance Fund shall compensate the

difference in wages caused by the transfer to lighter work since the first day of the certificate of incapacity of work.” (Eesti Haigekassa, 2021b)

All benefits, such as maternity, parental, and unemployment benefits, are related to contributions and calculated on the basis of social tax paid. For instance, maternity benefit is related to the contributions during the previous year. It is paid fully by the Health Insurance Fund, and is accessible to all insured pregnant women (Eesti Haigekassa, 2021c).

As was emphasised in the previous section, platforms like Uber do not take responsibility for people providing services via their platform, as they refuse to define themselves as employers. Therefore, all issues related to welfare and social protection are the responsibility of the person providing the service via a platform, not the platforms themselves. In Estonia, a person has social insurance only if she is able to pay the social tax contribution above a certain threshold. If the payment of social tax is not regular or for a month does not reach the set threshold, a person is not covered by social insurance. According to one social insurance expert (TA-EX-1), usually platform work does not guarantee social insurance coverage, but in most cases it is not a problem as most people also have a “main” job or are registered as self-employed or work under their own company, and might cover it through that. It was commonly agreed by the experts interviewed (despite scarce empirical evidence) that social tax is usually not paid from the income gained from platform work. Arguably, in most cases it is declared as occasional income or avoided in other ways as the reduction of labour taxes is the crucial competitive advantage of platform work in most cases.

In order to tackle possible tax avoidance, lack of social security coverage and offer less costly opportunity to declare taxes from (irregular) platform work, the aforementioned special regulation passed in 2018, the Simplified Business Income Taxation Act, together with the entrepreneur account system for natural persons was created. It provides possibilities to pay a lower rate of social taxes and be covered by social insurance. This is meant to be a way for a private person to operate as an entrepreneur in a bureaucracy free and affordable manner, without worrying about financial statements, monthly tax declarations and the payment of taxes – all of this takes place automatically under entrepreneur account entries. It is also possible to obtain social insurance coverage based on income on an entrepreneur account, but payments need to pass the minimum social tax threshold. Furthermore, no costs can be deducted from the income, which might hinder the interest of those who have considerable work-related costs (like fuel, insurance) to opt for an entrepreneur account.

To conclude, the main challenge related to platform work is that the social insurance coverage is guaranteed in the case of continuous payments of social tax above the threshold. In the case of strong income fluctuations from month to month, it might not be possible to obtain continuous coverage. Furthermore, people working for platforms without an employment or service contract do not collect/pay unemployment insurance (except for when they pay labour taxes for themselves) and thus, do not qualify for unemployment insurance benefits in case they register as unemployed.

1.5. Regulations 'in becoming'

In several countries massive uprisings against the platformisation of taxi and other services have taken place, and companies like Uber have been sued on numerous occasions (Kelly, 2016; Sarah, 2021). Similar court cases have been absent in Estonia, some of the reasons being the more techno-optimistic attitudes prevalent in society and the lack of collective mobilisation amongst platforms by their workers. In general, the attitude in Estonia society is very liberal, and therefore changes will more likely be driven by European Commission initiatives and regulations than by local ones.

Importantly, in Estonia the image of platform work is probably not as negative as it is in some other European countries. For example, Estonian men, who are generally in a more advantageous position in the labour market than women or minority population (Täht, 2019; Aavik, 2015 a, b) do not seem to be ashamed of this line of work. Similarly, they might not complain about the working conditions or take (collective) action trying to improve them. Rather, they can even take a lot of pride in the work, especially when framing their work as that of small-scale entrepreneurs. The latter status is also legitimized by current legal regulations of employment and emphasised by the taxi platforms, who call their workers "partners".

The debates (at least public/semi-public) on employment regulations related to the situation of platform workers have been very modest. In general, it seems to be taken for granted that platform work is outside employment relationships and platforms are service intermediaries, not employers. When platforms entered the market and were not legal/regulated, then some discussions regarding the employment status of platform taxi drivers were raised. For example, during the parliamentary debate in 2016 related to the possible changes in the Public Transport Act that would legalise platform taxis, opposition Center Party representative raised the issue of whether Uber and other platforms should be considered as employers:

"Looking at other spheres based on this analogy that you claim to be 21st-century regulation, does it make a participant in the sharing economy also to a certain extent an employee with rights and obligations resulting from this [including rights to health benefits, retirement benefits, insurance in the event that they become unemployed, and other social net features]? What might be the status of such an individual, as an individual entrepreneur (FIE) or something else—is it rather hobby-work?" (MP Andrei Novikov, opposition Center Party, cited in Lanamäki & Tuvikene, 2021).

The topic was silenced by the liberal Reform Party representative by highlighting that even in the traditional taxi industry most drivers are not employees. Furthermore, ride-hailing was depicted as a steppingstone towards becoming an entrepreneur (see Lanamäki & Tuvikene, 2021).

In addition, even if some discussions and media coverage exists, these seem to be characterized by a lack of concrete proposals on how to change the legal status of the platform workers in order to fit the Estonian labour market (Tuvikene & Holts, 2021; Vallistu, 2018b). There have been actors, namely researchers and labour representatives, who have highlighted the shortcomings of the current situation, where platform workers remain in a *grey zone*: they are not (totally) independent in regulating their working conditions, but the platforms do not take any responsibility for their employment. While researchers from the project Cities, Work and Digital

Platforms (Tallinn University, 2021) have highlighted possible shortcomings of the current situation – where platforms/algorithms dictate service prices and other working conditions, but do not take any responsibility for their workers – they have not offered concrete solutions, but rather highlighted the need for further dialogue. The latter is necessary also as **platforms and platform workers differ and so do their motivation and expectations towards platform work, so one regulatory system might not be suitable for all** (Tuvikene & Holts, 2021).

The Estonian Trade Union Confederation (Eesti Ametiühingute Keskliit, EAKL), who has discussed the topic of platform work amongst its member unions, argues that they would prefer the same/similar rules to apply to platform work as to regular work, as the aspect that digital tools are used for managing the work relationship does not change the relationship itself. Furthermore, only an employment relationship currently offers benefits like paid sick days and holidays. If platform work is regulated separately from other kinds of work, it will create unfair competition and potential for tax evasion. The EAKL has made a proposal to extend the concept of employee, so that all workers would receive at least minimal rights (including the right to collective representation) and social benefits (E-mail interview with the representative of EAKL, 2021).

Bolt (direct competitor of Uber who is dominating the platform taxi market in Tallinn) is of the opinion that employment regulations should not apply to their drivers, but when there has been allegations that the current situation is unfair, they have suggested looking at some alternatives on how to regulate a status that stays between employee and independent contractor (Pärli, 2021). Recently (June 2021), one of the founders of Bolt argued that the taxi platform industry needs to be more regulated indeed, but something alternative to the employment contract is needed: one of the options could be a taxi insurance system through which drivers would get social security. Another alternative could be an in-between worker status as in the United Kingdom (Võsumets, 2021).

Although Estonian labour legislation is rather flexible; for example, it is possible to end an employment contract with agreement between the parties, currently there are further plans to make it even more so. Flexibility in the labour market seems to be something promoted in Estonia rather widely and strongly. An example is the current agreement between labour and employer representatives and the Ministry of Social Affairs to allow employment contracts with flexible working hours in the retail sector. This would make it possible for employers to use employees as much as needed on a specific period and pay less for over-time. The agreement is currently being discussed in the parliament. If it passes, it will most probably enter into force for a test period (Soobik, 2021). In a recent seminar by the research group Cities, Work and Digital Platforms (Tallinn University, 2021), where this agreement was discussed related to its applicability to platform work, some participants (researchers, state officials and labour representatives) highlighted that it is probably not suitable for platform work, as it is still not flexible enough (e.g. the employer still has to employ a person in a minimum of a 0.3 position, and can change it only by 0.2 of a position), and 0-hour contracts might be more suitable with platform business models.

When specifically regulating platform work, Estonian policymakers seem to be waiting for instructions and directives from the European Union. For example, the minister of health and labour argued that although the social guarantees of platform workers is a topic that is often

discussed, the regulation of this kind of work in Estonia will be dependent on the legislative acts that the EU will pass (Võsumets, 2021). Therefore, it seems likely that platform labour will not be regulated before the (binding) instructions from Europe arrive.

1.6. City-level regulations for the taxi industry in Tallinn

In Tallinn's taxi industry, the local government is able to establish some small-scale local regulations for traditional taxis, but not for the platform taxis. Indeed, Tallinn has established a few local rules, including maximum prices for rides and the requirement to have a less-polluting car (Riigi Teataja, 2021b). These distinctions still create quite a lot of inequality between traditional versus platform taxis. Furthermore, the local government (in the case of Tallinn: the Municipal Police Department (Munitsipaalpolitsei, MUPO)) is the authority issuing the necessary licences for taxi drivers and monitoring the drivers at the local level (including platform taxi drivers). As was evident from the taxi industry focus group, MUPO is not satisfied with their current power over the platform taxi industry, as declining to give licences and monitoring platform taxi drivers is difficult under the current Public Transport Act (Tallinn taxi industry focus group, March 2021).

Monitoring platform taxi drivers is complicated for several reasons. First, it is difficult to distinguish platform taxis from regular cars, as the former might not have any visual clues indicating the car is used to provide taxi services. Second, the **legislation does not provide an effective means for monitoring platform taxis** (ERR, 2021b). MUPO does not have the right to stop "regular" cars for the purpose of checking documentation. They do conduct inspection purchases by ordering platform taxis, but a recent decision by the Supreme Court of Estonia (Riigikohus, 2021) stated that this strategy of targeting and inspecting platform taxi drivers is illegal, as the Public Transport Act does not provide such an option for the authorities to order taxis via mobile app in order to inspect the driver. The court concluded that the current legislation does not provide the possibility to effectively inspect platform taxi drivers. MUPO officials expressed the hope that maybe due to this recent decision finally some changes to the legislation will be made to make such activities possible. However, the participants were also a bit sceptical that such changes would occur, as the political will to regulate the sector more strictly might be missing: "*[for more than three years] we have made proposals to the ministry on how to better monitor [platform taxis].*" Nothing has changed this far (Tallinn taxi industry focus group, March 2021).

Although the Public Transport Act does not explicitly set language requirements on drivers, the Language Act states that drivers of public transport vehicles have to be proficient in Estonian at least at B1 level. MUPO does not have the competence to check the language level of the taxi drivers, but they have refused to issue the service provider card if applicants were not even able to express themselves at an elementary level when turning to MUPO. According to the officials, some potential taxi drivers do not speak Estonian, English or Russian. The Estonian Ministry of Economic Affairs and Communication on the other hand argues that MUPO should issue the card and only if the driver is caught during a drive, then their data can be sent to the Language Inspectorate who should evaluate the situation (Pau, 2019). On the other hand, in May 2019, the Estonian Sharing Economy Association – representing Uber and Bolt – sent a letter to the Ministry of Economic Affairs and Communications arguing that Estonian language requirements for drivers are threatening their economic freedom (Pau, 2019).

1.7. Impact of the 2020 Covid-19 pandemic

The Estonian government declared a Covid-19-related emergency on 12 March 2020 (first recorded case was on 27 February) and it ended on 18 May (some restrictions still remaining). Although remote work was promoted and sports clubs and other non-essential services were closed, people were still allowed to move freely within the country (except for one island, Saaremaa, with a high outbreak) with reasons such as work obligations, shopping for basic necessities and exercising, following the 2+2 rule in public spaces. Neither taxis nor accommodation services were prohibited but as tourism collapsed and people were staying at home, these services diminished considerably.

The state implemented several measures to support competitiveness and the survival of companies, such as postponing the repayment of loans, postponing taxes, providing salary subsidies and other similar measures. During the pandemic, Estonia implemented two state-wide temporary subsidy programmes (one for March to June 2020 and one for March–May 2021) for employees whose employers' business had been disrupted by the restrictions set by the state. To be eligible in 2020 for the March-May subsidy (eligibility for the June one was a bit higher), the employer had to comply with at least two of the following conditions: "The employer must have suffered at least a 30% decline in turnover or revenue for the month they wish to be subsidized for, as compared to the same month last year; The employer is not able to provide at least 30% of their employees with work; The employer has cut the wages of at least 30% of its employees by at least 30% or down to the minimum wage." (Eesti Töötukassa, 2020b). The 2021 programme stated that:

"An employer can apply for a temporary subsidy for employees, if: their turnover or income for the calendar month for which temporary subsidy is claimed has fallen by at least 50 per cent in comparison with the average turnover or income for the period December 2019 through February 2020, or the average turnover or income for the period July 2020 through December 2020; they can no longer provide employees with work to the agreed volume (§ 35 of the Employment Contracts Act applies) or they have reduced the remuneration of the employees (§ 37 of the Employment Contracts Act applies); they are not the subject of compulsory dissolution, liquidation or bankruptcy proceedings and at the moment of application they had no tax arrears or they have been deferred." (Eesti Töötukassa, 2021)

Furthermore, "Self-employed persons whose business income in 2020 was 50% lower than in 2019 can also apply for compensation. The amount of compensation for a FIE is EUR 584 per month." (ibid.). Also, starting from January 2021, only the first day of sick leave is not covered by the employer, who has to cover days 2–5, and after that period sick leave is paid for by the Estonian Health Insurance Fund (Eesti Haigekassa, 2021d). For people officially living in Tallinn, the city was also reimbursing the first sick day between the period of March and May 2021 (Tallinna e-teenindus, 2021).

Uber continued providing services in Tallinn, but during Uber's first wave of redundancies related to Covid-19 pandemic, they made all the employees in their Tallinn office redundant (Härma, 2021). It appears that Uber drivers were not even notified about this, as in a Facebook forum of Uber drivers at the end of May 2020, people were complaining that the Uber office is closed and asked if anybody knows when it will be open. In response, people were sharing a newspaper

article about Uber redundancies. Apparently, now driver support for Tallinn drivers is delivered through Uber's Polish office. 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 (see part 2.4 for the Uber drivers' views). This is understandable, as the Tallinn market is divided by different taxi platforms, and the local market is ruled by Bolt. Therefore, most Uber clients are tourists, and tourism has collapsed due to the pandemic and related restrictions.

The current pandemic situation has clearly decreased earnings for drivers and shrunk the taxi market in general. It is not clear how much Uber's turnover has changed during the period, but Bolt announced an 85% decrease (Postimees, 2020). As explained above, the government compensated salary losses for the employees of many companies whose business activity decreased, as the main social policy measure used in Estonia in connection with Covid-19 has been income replacement, implemented by the Estonian Unemployment Insurance Fund (EUIF). From March to June 2020, the subsidy was paid to enterprises which were struggling and followed certain criteria. One of the biggest support payments (5th place) was given to Bolt Technology OÜ: 1.4 million euros. However, it is important to note that drivers were not eligible, as they are not employed by the platforms. Support from the state only concerned actual employees (EAS, 2021).

As highlighted by one of the experts, "Platform workers are not real employees nor real employers and they are pushed into the grey zone" (Focus group discussion on platform economy, November 2020). During the Uber and Airbnb focus group in November 2020, the participants clearly emphasised that none of them received the subsidy meant for own-account workers, as they did not fulfil the necessary employment/tax conditions. The experts that we interviewed in November 2020 also agreed that due to their *grey zone* status, platform workers can fall through the cracks of any state compensation mechanisms (Focus group discussion on platform economy, November 2020).

Furthermore, platform taxi drivers encountered increasingly risky working conditions: "related to the pandemic we are trying to lessen human contact, but when doing this kind of work it is necessary to be in contact with different people, for example, if you offer a transport service; and this crosses to the aspect that they [platform workers] do not have social security, but their risk level, risk factors are amplified considering health, wellbeing" (Focus group discussion on platform economy, November 2020). Regarding the safety of drivers, MUPO representatives elaborated that traditional taxi companies usually have provided decent protection (masks/shields/disinfectants), but with platforms it has mostly been the responsibility of the driver. Uber did not provide their drivers any safety equipment during the pandemic (some drivers were complaining that only in May 2020 did Uber order them to wear face masks). Some taxi companies installed partition screens and started providing delivery services (PM Tarbija, 2020). Regarding social security, it depended on the concrete driver. If s(he) paid the minimum amount to receive social security, then s(he) had access to it (e.g. when losing a job during the pandemic), otherwise not.

A hot debate ensued at the beginning of April 2020 around the issue of Bolt asking to borrow 50 million euros from the state (as their revenues had dropped and commercial banks were not willing to provide loans on suitable conditions) (ERR, 2020), but the state did not grant them this support (Digigeenius, 2020).

PART II: PLATFORM WORKERS' PERSPECTIVE

The following part of the report is devoted to the perspectives of platform workers working for platform taxis. Although all of them worked for Uber, most also used other applications and were able to compare their experiences of working for different apps. The topics are divided into three broad categories – labour process, skills, social security – followed by a fourth section about how some of these workers have experienced the 2020 pandemic in their working lives. The last section of this chapter raises some alternative ways highlighted by the interviewees on how the (platform) taxi industry could be organised.

2.1 Labour process

The **reasons** the interviewees started to work through Uber and other taxi apps are manifold. So are the reasons they still continue to, and these reasons might be different to their initial ones. These include the need/desire to earn extra income to their main employment, not finding a more secure or higher paid or professional job, and using the option to earn income (during studies) with a flexible schedule. For those who started out as traditional taxi drivers, using apps in addition to or instead of their *traditional taxi* was because driving only traditional taxis became more difficult after platforms entered the market. For new migrants, taxi apps can also be a way to enter the labour market even without speaking Estonian. There are those who started providing the services in the very beginning when Uber and the locally-owned Bolt (back then Taxify) came to the market in 2015 and 2013, respectively, and this area was without any regulations and was advertised as a way to share your car and earn something extra. Some interviewees expressed nostalgia for the period of 'actual ride-sharing' where their service was different from the traditional taxi service.

The flexibility of choosing your own working time was often highlighted as the main advantage of this kind of work (some had other work/study obligations, so having a free schedule was seen as an advantage that not many jobs provide). Some embraced the flexibility aspect totally, talking about taxi-apps as **client-providing platforms, not employers**, and vouching for fewer regulations. Others, although highlighting the positive aspect of flexibility, also saw working for taxi platforms as a necessity that they would stop if there would be other (better) options (e.g. pay rise in the main job or professional job available). In the Estonian context, flexibility seems to be often internalized as something to be strived for in the labour market, and even if you are not satisfied with your work situation, you might still speak up for loosely regulated platform work. For example, one of the respondents who did not manage to find better employment highlighted: *"/.../ the platform is like an ultimate expression of the free market"* (U_M_Tln_6), and emphasised that the less regulated, the better. Another interviewee also argued for the fact that platforms cannot be considered as employers:

As I see the service: I choose when I work and for whom I work and what kind of clients I provide the ride to. Uber is just the communication channel that brings together me as the driver and the clients. And it does not give me work directly, but just informs me about the clients. (U_M_Tln_3)

There were also those interviewees who **saw taxi platforms indeed as employers** and doubted if the current situation where they do not have any responsibility for their workers is fair. On the

other side of this flexibility, the drivers also expressed feeling **insecure**: you can never be certain how much work there is, how much you have to wait. The interviewees argued that the taxi business, which platforms are also part of as the rules and regulations generally overlap with the ones for traditional taxis, is built on the lowest price offers (**price dumping**) and although clients could be satisfied, taxi drivers are the ones taking the blow of ever decreasing rates. They acknowledged that if you actually pay all the taxes and taxi insurance,⁶ there is no real possibility to earn a decent income (not even a minimum hourly wage).

In Tallinn, it is a common strategy to use **multiple apps** (Uber, Bolt, Yandex, Taxigo) at the same time and when talking about Uber, the interviewees generally compared it with other apps, whilst Uber stood out as the most elitist. Uber is the app with the highest entry barriers. Mainly because, compared to others, they check if the driver has all the necessary documents, including taxi insurance – and if these are lacking or expired, you cannot provide the services. Second, Uber restricts consecutive driving time to 12 hours, after which you have to take at least a 6-hour break. Some interviewees highlighted that overworking is a serious issue that can cause accidents in this line of business (so Uber is doing at least something to prevent it). Furthermore, there seems to be a generally agreed **hierarchy between apps**, where some interviewees highlighted that using Uber is their first choice – the reasons for that included better clients and rates (although rate differences with Bolt are small), better functioning application (e.g. client can leave tip via the app) and Uber's decent communication with drivers. However, multi-apping seems to occur because Uber lacks clients, so there is a lot of waiting time. The high season for Uber-driving is when there are tourists and big events, as Uber is to a large extent used by tourists, and Estonians seem to prefer Bolt. In addition, some **negative aspects** of Uber include not correctly functioning price multiplier, no bonus for longer trips and no possibility to set a radius for your rides – in Tallinn you have to service the whole city and surrounding Harju county, which is not densely populated and longer trips are usually not beneficial for drivers:

To travel 15 kilometres and then get three-four euros and we have to pay ... Uber will deduct its commission and then we will get only three or four euros, so ... And we have to come back again, to the city, empty. (U_M_Tln_7)

Although some argued that **refusing rides** in Uber is not problematic, as Uber has enough drivers and they do not block people as aggressively as Bolt, others felt that the difficulty of refusing rides is really problematic: if you are your own boss (as Uber emphasises) you should be able to decide your working methods yourself, including being able to choose your rides. This is especially important in the Tallinn context, as some rides (e.g. longer ones outside Tallinn) are not really beneficial for drivers. Those who had been blocked by Uber had gotten their accounts open quite effortlessly. However, some highlighted that when they have asked Uber why exactly people **get blocked** from the app, the Tallinn office (that was closed at the beginning of the pandemic of 2020) seems not to know how the application works. This leads us to the **algorithmic management and surveillance** that some interviewees felt rather strongly. For example, one of the drivers explained

⁶ It is important that in Tallinn all platform taxi drivers have to have taxi insurance (even if they do only a few rides per week), which can be several (five) times higher than regular car insurance. Also, for leased cars, banks have to give permission to use it for taxi-driving and they might say no.

how he has been put onto a *black list* because he cancelled three clients in a row as they just did not show up:

Well, the last time was just a couple of weeks ago. Completely by accident on a Friday night I had three clients via Uber: I got to the place, waited in the right place and they did not show up. What else can I do but to try to contact them. Client does not answer. So initially I cancelled the ride. It wasn't a problem for me as there is this cancellation fee for a driver, but the thing is that there were three clients in a row like that! It was a bit suspicious even for me, but I guess the Uber system saw that it is suspicious and blocked my account. (U_M_Tln_8)

Another driver explained how he received a letter from Uber accusing him of cheating the system. He got pretty upset as he argued that cheating is practically impossible. Furthermore, some argued that the pricing policy is not transparent (e.g. the app says the price should be 3x higher indicating a red colour on the map, but the rides that are offered are still at a lower price). A few of the respondents contacted Uber asking about this, but the answer was something like "it depends on demand". **The lack of transparency** is also felt in relation to client feedback: there is no way to know who gave a bad rating and why if they do not add comments (which, fortunately, Uber enables). During the interviewing period, Uber had a bonus system (do an increasing number of rides and you get a bonus), which one of the respondents summed up as **a game that makes you want to work more and more**, which can be dangerous (e.g. sleepy drivers driving around). Bonus systems seem to be one of the main management strategies that taxi platforms use to get drivers working for them: both away from competing platforms but also to motivate drivers working at specific times:

Every application is trying to give some incentive, so the driver might be in a hurry, to do those stuffs. This is the most difficult part that you have to follow the signs. Two days... Three days back I was going and the ... I was in a hurry, I wanted to complete that ride and get back to the city, because my friends said that there's a peak hour in the city. So, on 30 [km/h] speed-limit road I was going on 50. (U_M_TLL_12)

These systems are sometimes not transparent and can change rather quickly, increasing the insecurity felt by the drivers. Furthermore, these incentives from the platforms can also motivate drivers to take risks in traffic, as the above quote highlights. Bonus systems are something that drivers generally highlight when asked about how taxi platforms direct their work. However, not all drivers think of the algorithmic management and surveillance as problematic (or think about it at all):

I do not think they do anything [to direct drivers]. Well, they only direct by putting back the bonuses, so people would get out more to drive, to switch their apps on. (U_F_Tln_2)

There are drivers who use several **strategies** to increase their livelihoods, while others seem not to. It seems that tech-savvy people can strategise better (e.g. know how to check out how long the ride might be). Bonus systems also change quickly. Although flexibility in terms of working time was often highlighted by the interviewees as the main advantage of this line of work, when talking about strategies that make the work more profitable, one of them actually chooses the "right time" to work. However, the work schedule of the interviewees varied. While some drivers preferred

to work during evenings and/or nights and weekends, others worked during regular working days (e.g. from 8am to 6pm). The main strategy for increasing income for many interviewees was to take orders from the app that provided the best prices at that time (e.g. had peak time coefficients or some bonuses); therefore, these strategies extended beyond a single app.

The Estonian ride-hailing sector stands out compared to the same sector in several other countries for its **lack of collective mobilisation** against taxi-app companies. There have been some collective actions against Bolt's dynamic pricing policy, but these did not lead to any changes (Pärgma, 2018). Taxi-app drivers, even those who see the need to regulate the market more and demand better conditions from the apps seem to express the attitude that it is very difficult, if not impossible, for workers to change anything, as Story-box 1 below exemplifies.

Story-box 1: Navigating Gig Work, Understanding Risks, Questioning, Keeping up hope

Indrek is a driver in his 40s. With secondary education and professional background in a variety of different service positions, where he has always had direct contact with customers. He once considered working in public transport, but felt this might be too much responsibility for passengers, their being on time and safe. So, he took training as a taxi driver and started working as one, and it is from that professional background as a taxi driver that he looks at platforms like Uber.

Today, Indrek diversifies his income by operating in several ride-hailing platforms in parallel and also doing other gigs. He has a one-man traditional taxi company, as this allows him to offer taxi services the normal way – getting clients from the street. Of course, this way he sets higher tariffs than what Uber and other apps provide. However, nowadays getting clients that way – from the street – tends to be difficult. Nevertheless, he seems to take pride in the work; he regularly works as a driver equivalent to a full-time job.

He tends to see the most important skills being those related to customer service, communication and the management of his customers' mood and behaviour. He mentions politeness, communication skills, and knowledge of the city as easy, really basic things that are not even worth mentioning. However, he still mentions the taxi driver training as useful and valuable – meaning, this cannot be that easy, but he does not seem to notice. On the other hand, the way he manages his work – combining regular taxi service with several platforms – indicates that he is quite tech-savvy and feels strongly about optimizing his working times, routes, schedules, and customers. So, he takes the work quite seriously, and likes the customer service part of it.

This does not prevent him seeing the wrongs in this line of work. He also regularly stands up for his rights against taxi-platforms, especially through the drivers' Facebook forums. Being outspoken against wrongdoings by several platforms, he has been noticed by the offices and sometimes gets *punished*. Therefore, his experience makes him see very little possibility for workers to stand up against the platforms when they see injustice, or when they would like to try to improve their working conditions, when the app can just block you and take away your livelihood:

Well, those who stood against Bolt's system, they were all blocked. So like, tried to make a trade union or something like that... /.../ The process stayed unfinished. That was two years ago. So we

do not have a trade union here in Estonia. We have the power of the app. Let's say that the drivers do not have a right to say anything.

Being blocked by a platform seems to be a huge issue in Tallinn. Most platform taxi drivers do not drive for only one platform, but diversifying their platforms is a necessity to earn a decent income. In addition, when asked about the positive and negative aspects of working for Uber, drivers frequently compare it to other platforms. For example, for Indrek, compared to other ride-hailing platforms, Uber stands out as better ('best of the worst'), as although it lacks clients, thus there is constant uncertainty of earning with Uber, (at least before the pandemic when Uber still had an office in Tallinn) their communication with drivers was rather decent and they are the only ride-hailing platform that explicitly follows the state regulations. He sees one reason why Uber has less clients is its very marginally higher rates, as he considers clients to be extremely price sensitive.

When asked what would make him stop working for Uber, he only lists possible wrongdoings that Uber would consider offensive – but nothing that he might himself feel as a good enough reason to leave. This is regardless of him protesting the price arrangements, questioning the platform's business practices, thinking about his lack of health insurance and problems arising from retirement age getting nearer. With all the quiet or louder protesting about working conditions and unfair treatment by the platform, and while questioning the dignity of the line of business because of this, he does not really see himself leaving the rideshare platforms.

These days, he feels that going back to work in other parts of the service sector would mean giving up much of the comfort arising from the flexibility of being able to choose his own working hours and deciding to change them whenever he needed to.

The problems behind why collective mobilisation seemed unfruitful to the interviewees relate to the huge pool of available drivers, general (perceived) weakness of trade unions in Estonia, and the 'power of apps' to block drivers who 'act out'. Some drivers practice **individual agency** by sending Uber feedback on how to improve the app, but it was also mentioned that the only feedback Uber expects from drivers is the following:

Some kind of simple and fast survey that wants to know how satisfied you are with Uber as your cooperation partner. I have filled it a few times, but it is very general, rating some stuff on a scale of 1–5. (U_M_Tln_8).

Generally, it seems that both individual and collective **agency is constrained by the power of the app**. The work can also be quite isolating, as some do not know any colleagues that use a taxi-app and sometimes (Facebook) forums are the only place to discuss work related matters (In Tallinn Uber-drivers' forums are less active than Bolt-drivers'). Uber also expects all communication with them to be done via the app, so there is no personal communication. The former can sometimes be too slow and inconvenient, although there are drivers who expressed satisfaction with that as well.

Those who have also worked as **traditional taxi drivers** highlighted how the working conditions have deteriorated, although in Estonia traditional taxi companies also do not provide employment contracts to their drivers. One of the differences that those who also drove or had

driven traditional taxis emphasised, is that with traditional taxis you can set your own price tariffs. Taxi-apps also compete with each other, driving down the prices. One of the interviewees with longer taxi driving experience stated:

Then when I came back [from a foreign country], I started to drive Uber. And also Taxify, which is now Bolt. It was rather good in the beginning, but the situation has become worse and worse. There are more drivers and now the situation is really bad. This is not a job any more. If we look it like that, a few years ago you could say it was a real job. When you did it full-time, then you could get a decent salary after all expenses, but now you cannot. You cannot earn the same income working the same hours. (U_M_Tln_14)

Some respondents who complained about low prices and high competition thought that the situation would improve if other platforms would also start requesting some documentation from drivers as Uber does, but generally the interviewees did not express strong attitudes towards the need to regulate the market more.

Relationship to work-related resources

Starting ride-hailing requires investing some initial resources, including economical, such as equipment (e.g. buying, leasing or renting the car, but also other technical devices to stay connected), as well as investments in insurance and all the permits (including the vehicle card that increases the insurance payment). This means that one needs to have **access to crucial information**;⁷ in addition, one interviewee relied on the suggestion from their friends who knew they liked driving, so information is important in more ways than one in deciding to start driving for a platform. Apart from specific assets and information, other useful resources included different aspects related to human capital – previous work experience in logistics, earlier experience in the field, knowing the customers and the city, knowing the titular language, but possibly also a level of formal education.

Some of the drivers we interviewed had **access to their own car, a few were renting**, others had rented and decided to get their own car. It is difficult to say how this defines their experience of ride-hailing: most rely on multiple apps at the same time, making use of the diversity of customer profiles that different apps offer, and therefore also experiencing the different business practices provided by the different brands. Renting a car for ride-hailing purposes was generally deemed to be too costly, and therefore not economical, even pushing one into poverty, and owning the car was sometimes mentioned as giving an additional sense of security. However, those who were renting their car from a rental company (e.g. weekly) were happy with the fact that insurance and other documents “are in order” and they do not have to worry about repairs, while some highlighted special arrangements that the rental company offered in relation to ride-hailing apps. One interviewee calculated that driving a rental car is actually more economical, so it seems that the perception of the need to own a car depends on how one works and, perhaps, on good accounting skills.

⁷ While Uber is good at providing a list of such prerequisites, some other platforms may not, and sometimes our interviewees pointed out even assuming (wrongly) that in the other platforms this is not required, making Uber seem too difficult to access.

Some also **drive a regular taxi in parallel**; these workers usually have their own car and provide taxi-services through their own company. We see this experience with regular taxis as defining the experience with ride-hailing. Those in our sample who combine regular taxi services with ride-hailing often make reference and direct comparisons between these, while those who only use apps like Uber in their driving do not otherwise compare Uber with taxi companies but to other platforms operating in Estonia (that they themselves may have been using now or in the past).

It is interesting to note that a number of our interviewees also had **entrepreneurial backgrounds**, either in the past (sometimes ending in a lack of success) or currently (e.g. one interviewee runs a business abroad). As one of the interviewees put it, being an app-taxi driver equals being an entrepreneur, except it is easier because there is less mental pressure and no employees:

Being a taxi driver is a cowboy-like job. You are alone really /.../ Everything depends on yourself. (U_M_TLL_15)

On the other hand, one freelancer with a one-man-company considered working for multiple firms too exhausting, and they resorted to Uber when their main “customer” cut their orders.

2.2 Skills

Starting as an app taxi driver, as the interviewees confirm, requires minimal skill – sufficient driving skills and knowledge of traffic rules to pass the tests to apply for a driver’s licence. Therefore, it is generally perceived as a low-skilled occupation: if you can drive a car, you can do the job. No actual formal education requirements are made beyond schooling to get a driver's licence, even though some have also graduated from a special training programme for taxi drivers.

The skills that are important for success as an Uber driver are likely learned on the job as informal learning, while the basis for these is laid in prior learning and work experiences. Relevant skills highlighted by the interviewees when asked included references to hard skills and soft skills. **Hard skills** here mean anything that can be learned and objectively tested, included several types, especially those related to: (1) having good driving skills and being a polite driver, (2) knowing the city, and (3) having a *good* knowledge of the local language, but also (4) knowing the rules of the country (e.g. traffic rules, but also informal rules) and (5) knowing regulations (e.g. related to the car); (6) being familiar with accounting; (7) being tidy, and (8) having a clean car. Hard skills are often reflected via negative examples, where their lack is apparent, as in those examples discussing the relevance of good driving skills, knowing the city, and knowing the rules and regulations:

Quite often you see those cars (with signs from another platform), which attempt rather obscure moves every now and then. And then you have a glimpse of the driver at the wheel, and you can tell that they are probably not local! (U_M_TLL_8)

The latter example also demonstrates how lack of some skills is related to the driver being a foreigner.

In the next example, there is even some nostalgia about knowledge of the city being important:

In the old days we had decent taxi drivers: they drove a Volga [type of car], they knew the map of the city by heart. (U_M_TLL_11)

This reflects a critique of the applications that predefine the routes, and the pride locals have in knowing their city.

Of **soft skills**, or those that may vary from situation to situation and are regarded mostly subjectively in the given context, the interviewed drivers mentioned the following: (1) elementary politeness, (2) communication skills, (3) *excellent* knowledge of the Estonian language, (4) some knowledge of other languages, (5) being calm (in traffic as well as with customers), (6) being patient (also, while waiting for the next ride), (7) having self-control, and (8) not being afraid of instability.

Among the hard skills, *good* knowledge of the Estonian language was mentioned, which can be measured rather easily by, say, tests. When listed among the soft skills, the same knowledge of the Estonian language points to the fact that someone who prefers to speak in Estonian might reward the driver based on their excellent knowledge of the Estonian language, and give less regard to the one whose spoken Estonian is poorer, even if it is, strictly speaking, good enough to understand and communicate everything that is necessary to provide a good service.

Among the soft skills, there is also, for example, knowledge of any additional, unexpected language of some customer that enables the driver to provide something additional to the service:

Given that I know the Finnish language quite well, then they [Finnish tourists] are usually rather pleasantly surprised – and it is possible that I might earn additional tips for this. [U_M_TLL_11]

This citation refers to additional skill. The next also quote mentions knowledge of language as important, but suggests that this is important insofar as it helps provide the customers the *attention* they seek:

Well, this ridesharing customer, of course she seeks a lower price, but in fact she actually wants personal attention. This is almost impossible to offer if one does not know the language well! [U_M_TLL_1]

Here we see how language skill is seen as necessary as a soft skill: not just to discuss traffic, but to be able to keep up small talk or provide a supportive environment and attention, when it is sought. Offering personal attention, human attention, or even recognising that this is expected, is to be seen among the soft skills that may be needed to secure success. Focus on communication skills that include politeness but also go beyond politeness are reflected in the next quote:

One has to be kind of calm, patient, both in traffic and in communication with customers. There are different kinds of customers. And, beyond this, one also has to be flexible, to the extent that some situations require very quick reactions. In some cases one may be provoked, while some cases are such that one shouldn't get involved... Well, sometimes, perhaps it is useful to be able to just hear a person out. [U_M_TLL_1]

So, it is kind of expected that a good driver is also a good psychologist, as *hearing a person out* and *knowing when not to get involved* are definitely soft skills.

Beyond hard and soft skills, some additional skills emerged as important from the drivers' own descriptions of their work, even though these remained more salient, **implicit skills**, as the interviewees did not consciously reflect on them. These involved: (1) having good technical skills; (2) having strategic thinking (tech-savvy was mentioned to be able to strategize better given the bonus systems); (3) having good long-term (e.g. monthly) strategies for planning the work time (including rests) and earnings; (4) an entrepreneurial spirit and experience; (5) earlier experience of driving a regular taxi (though this might increase the expectations); (6) responsiveness to keep up with the rating (such as checking if somebody gives a bad score and try to improve the situation, as in adding more fresheners, when a bad smell is mentioned); (7) resilience (given the dangers of the job, survive experiences of racism and criticism, e.g. for not speaking good Estonian); (8) ability to build social capital and rely on professional networks.

It seems even fair that good technical skills are not mentioned in a straightforward way because they are taken for granted. *Responsiveness* and *resilience* are reactive strategies related to self-control: either doing something or refraining from something, they are about answering to someone else's needs. On the other hand, aspects such as building social capital include groups of drivers meeting regularly [U_M_TLL_14], relying on friends who suggested the app in the first place [U_F_TLL_13], discuss taxi-app related issues on the social media group [U_F_TLL_12], and these are all indeed strategies for coping better in the field. But specific skills can be recognised within these practices, and thus it is important to be aware of these.

The skills relevant for success in driving a platform taxi are practiced in the daily work, and are also likely developed over the course of one's engagement with the platforms. The drivers specifically mentioned possibilities for learning languages and getting better over time at recognising people. However, if any of this *learning* is taking place, this is specifically through informal, self-planned, independent learning, *supported* by the desire to do their work better (= most efficiently) and in response to feedback received through the rating systems.

It is important to note that some skills are not mentioned explicitly. The drivers do mention being calm and polite, safe driving, good knowledge of the streets and excellent communication skills with a good knowledge of languages, being friendly, listening, and avoiding troubles escalating. However, there is a myriad of other, more implicit skills that are necessary, and that are being developed during the customer-oriented ride-sharing experience. It seems that formal education may or may not have prepared the drivers for these challenges, and if those with a higher education have some advantages, these are more along the lines of being able to better plan and strategize – but not necessarily in all cases.

The skills are on the whole also well in line with what is often portrayed as traditional taxi driving skills, with perhaps a few exceptions: extra possibilities for the tech-savvy (emerging from platform-economy specifics); strategic thinking and entrepreneurial spirit (compared to regular taxi companies, each driver has more responsibility); responsiveness (*vis-a-vis* ratings); resilience (since there is no one to protect and mediate). Coping with puzzling ratings, for example, seems to require both resilience and responsiveness, but mostly requires drivers to be calm and patient. The experience with ride-hailing platforms has also shown (some)

customers/riders appreciate the skills that platforms could have made redundant by design: verbal **communication skills** that require a common language (by design, the rides could also occur without exchanging words) and **knowing the city** to navigate most efficiently (by design, the apps provide the routes and maps to drive by). Relaxing those requirements may have lowered the access barriers to bring new demographics and especially recent immigrants to the ride-hailing scene, but as the riders are used to these *perks*, some seem to mourn their loss. While new generations of *digital native* riders might get more used to the new standards, it seems that top ratings may motivate many drivers (especially those from older generations or with earlier experience from regular taxis) to keep up with these special features, thereby pushing up the standards and, eventually, setting this as a new norm for the highest ratings.

Deskilling

The respondents had diverse educational backgrounds: there are those with only a secondary level of education, those with higher education as well as those with master's degrees or equivalent, and some of the interviewed drivers were currently in their degree studies. Some had a professional job, or have had it earlier. Some in our sample once took the taxi driver's training programme.

No one in the sample sees app driving as strongly contributing to their skills, or their CV in general, and this is sometimes rather seen as eroding their human capital, as they do not make use of all their skills and there is a lot of waiting time involved. The drivers do not see that they make full use of their skill-set in this line of work, but they also do not feel that it intervenes in the rest of their life:

I switch myself on exactly when I want, and also just like that I switch myself off exactly when I want. In this sense the job is rather easy, because then my brain is also switched off from the work and I do not have to think about it anymore [when I am switched off]
(U_M_TLL_8)

Especially those with (previous) experience of driving for a regular taxi service or with a positive image of this job from earlier, they see the de-professionalisation of the occupation. The following quote shows how one interviewee discussed deskilling in the profession, discussing the loss of requirements and necessary criteria for applying for a licence to be allowed to drive a taxi:

Four years ago, I applied for a taxi licence and there were tougher rules then, requiring training, taking exams, and... And I needed to prove my fluency in the Estonian language and some English... But now, nothing much is expected of you [to get the papers]!
(U_M_TLL_12)

Some of the drivers admitted to breaking their own earlier stereotypical opinions of app-riders only when joining the scene:

In the very beginning [of ridesharing starting in Estonia] people met in parks and talked, so I understood that the group of drivers is very diverse. I would say that in the beginning that stereotype of the full-time Uber driver I had was that he is like a loyal customer at a

pawnshop, and he is in fact acting, well, for a system that enables him to still earn his own money, not from the creditors. [U_M_TLL_1]

On the individual level, it seems that the expertise required and collected for successful Uber-driving goes rather unnoticed even by those in whose case this could be expected to be most clear – those who have been active with the apps already for a longer time.

We could see indications during the interviews that a certain upgrading is possible through a tech-savvy, rational approach (but not through using one's *voice* to make suggestions to the central office or protesting online) that would not be available in the regular taxi business. Therefore, it may be that the most entrepreneurial souls with greater initial resources might find ways to make the most out of this profession. At the other extreme, there are claims that drivers do not see this as an earning possibility but rather as a way of life, committing themselves to the philosophy of 'sharing rides with others' – and it may happen that sometimes these are the same group. In between the two extreme approaches – making the most of the app or seeing it as a lifestyle extension – there is the discourse about Uber being just one option to get by, perhaps until something better comes up, and a sub-discourse where ride-hailing is presented as a way to earn a little extra on a regular basis. For the different types of arguments, different sets of skills seem crucial (see Table 3).

Table 3: The key skill sets for drivers according to their main motives for driving

Type	Economic arguments prevailing			Non-economic arguments prevailing
Sub- type	Important source of income but only temporarily	Regular source of extra income	Making the most of the app (<i>main or extra income, temporary or regular</i>)	Lifestyle-discourse
Main feature	Would rather quit and earn money elsewhere	Would rather not need to earn extra, but is quite ok with earning this way	Tech-savvy strategic planning to platform-generated income	Ride-sharing philosophy
Key skills	Politeness; ability to stay calm and patient; good self-control; being tidy and having a clean car; resilience; responsiveness to ratings		Technological skills	Communication
			Strategic planning, entrepreneurial spirit, good knowledge of the city	Recognising opportunities, entrepreneurial spirit
Description	<i>Getting by, doing your best: resilience and responsiveness become key skills</i>		<i>Some passion in the game, can use the app for self-expression: strategising, enjoying communication, choosing customers</i>	

Source: authors' own analysis

In fact, in some cases, the skills stepped in as a proxy for other dimensions: during the interviews some of the drivers from the dominant socio-demographic group kept making reference to the other socio-demographic groups, such as referring to visible minorities and recent immigrants without any knowledge of the local language. However, rarely did those comments mention the age or gender or even the ethnic or migration background of *the others*, and the criticism is rather presented as a way of highlighting the lack of skills – most clearly, lacking knowledge of the language and lacking the knowledge of the city (in terms of maps, routes, etc.).

2.3 Social protection

Social protection plays a central role in reducing and preventing poverty (e.g. via unemployment insurance) and providing access to health care via health insurance. What are the strategies platform taxi drivers use to access social security and which trade-offs do they face in their choices? In this section we will look in detail at the grounds the drivers use for obtaining social protection and how they make sense of their choices.

In our sample, we have a wide range of possible ways to obtain social protection. We have interviewed drivers for whom the social tax contribution is paid outside of the platform work and they are covered by health insurance and other aspects of social security from their main job or because they are officially enrolled as students. We also interviewed drivers who make social contributions and obtain coverage through platform labour using multiple apps, including Uber. Finally, we also have one Uber driver who does not have health insurance in our sample. We cannot make any conclusions about how many platform taxi drivers are without social security coverage; however, we can open up the reasons behind their choices. One of the repeated arguments was that “one can work for Uber if one has health insurance from somewhere else”. These were people for whom platform work was a source of extra income alongside other activities. For example, some were officially registered as students, while others had a main day job and drove a platform taxi for extra income.

‘Students’

On the one hand, the students in our sample were from different ethnic backgrounds – foreign students and local students with minority ethnic backgrounds. From a social status perspective, however, they were a rather homogenous group. All were below 30 and were somewhat privileged at least in our selection as being able to afford to own a car. It seemed that the opportunity to have health insurance from the state, thus avoiding the necessity to pay social tax contributions and having their own car made it possible to more easily find a balance between the costs and benefits.

‘Extra income – patchwork’

Second, a very heterogeneous group of drivers combines this line of work with other income sources: some lacked enough income from their main job and so drove a platform taxi out of necessity, others were driving Uber for techno-optimistic reasons trying to keep up ‘the original spirit of sharing the car while going in the same direction’. One common line in this group was that they all drive around 10 hours per week and worry that the costs are too high and there is a strong need to find a balance so as to earn something. One way for this is to avoid taxes or opting to go without the mandatory car insurance for taxis (i.e. risking a fine) or other strategies used to

find a balance and make driving beneficial economically. They constantly brought up that **paying taxes is a grey area**, costs are too high to follow all the regulations. They are covered by social protection either from their main job if they are employees or from their own company, which is often a one-person business created to optimise the taxes. One specific type, who invest considerable time in analysing how to optimise their outcomes, also emerges: techno-savvy tax optimizers – they have developed detailed logic and strategies to make the most of the benefit systems offered by Uber, Bolt or other platforms, trying to pinpoint the logic behind the algorithmic management by optimising their work hours and timing and also finding ways to reduce the tax load via their own small company.

'App taxis as a source of social protection?'

In Tallinn, it is not possible to survive driving only one app. Thus, if driving platform taxi the only source of income, drivers are simultaneously using multiple apps, next to Uber also Bolt, Yandex and sometimes others. There are not enough clients available through Uber and the Uber market is characterised by strong seasonality which depends on tourists, since locals use the other apps more.

Everyone in our sample who pays their social tax from their taxi driving income drives at least 40 hours per week and in one case 60–70 hours per week. Several interviewees outlined that there are many taxi drivers who work enormously over the *normal* workload and that Uber is the only app on the market which requires a break after 12 hours of work. However, drivers can then drive using other taxi apps.

There are different strategies to negotiate an income – some have their own car, some rent. However, all are own-account workers and pay themselves a minimum salary (or slightly more) to get health insurance, even if they actually earn a considerably higher income. It is not possible to cover the costs related to the car, pay all the taxes and earn an acceptable amount; the respondents repeatedly outlined that this needs a lot of balancing and finding trade-offs.

'Without any social protection'

When drivers have to cover a lot of car expenses (like lease payments for a car), the **income earned through taxi platforms is not enough to cover even the minimum amount of social tax**. As the case of Jane (female, 48) shows, social tax contributions might be the first to be sacrificed and she drives without social insurance. She is not worried about it and does not look for solutions as it does not seem possible for her under the current circumstances. She stresses that the flexibility of such work is a great asset and she sees the freedom in it. She works for multiple apps, including Uber, and does not want any stickers on the car to indicate a specific company. As we have only one case without health insurance, this is a possible area for further attention (see more from Story-box 2 below).

Story-box 2: Carefree attitude towards platform taxi driver's life despite social insecurities

Jane (female, 48, with secondary education) has been a platform taxi driver for around four years. She started with the local platform Taxify (now Bolt), then joined Uber 2.5 years ago and currently also uses another local app TaxiGo. Jane started based on the recommendation from friends who knew she liked driving. Currently, taxi apps are her only source of income. Whereas working in

the taxi industry was “like a flower” when she started four years ago, Jane emphasises that price dumping due to competition between apps has been intense and made the life of drivers much more difficult.

She likes the freedom to choose when and how much she works as well as communicating with the clients and says she could not imagine having a nine-to-five job. Jane works mostly at nights, about 16 to 20 hours a week. She starts from 10 or 11pm and drives until about 2 or 3am on weekdays and until 6 or 7am on Friday and Saturday. Jane has chosen to drive at nights because she feels that sitting in traffic jams does not pay off. She does not feel more threatened by the clients because she is a woman. She feels she has sufficient experience to position herself in town so that she has enough clients and also pays attention to large events and waits nearby to get clients. To be a good taxi driver, Jane thinks that you need to know the city, speak different languages and be polite. She stresses, you cannot really trust only the app to get you where you need to go. She keeps an eye on the price coefficients to choose the app offering the best price but when there is little work, she keeps all apps open in parallel. She rejects the attempts of different apps to mark the cars with their logos and likes to leave herself the room to manoeuvre between the apps.

Overall, Jane is satisfied with Uber, especially compared to the other apps: she thinks the Uber pricing system works better; there is a working feedback system with the app administrator and Uber keeps track of all documentation. The only thing Jane would like to change is to choose a preferred area where she wants to work so she would not lose in activity score when refusing clients far away. Jane also talks about low prices and fierce competition, but thinks this problem would decrease if other platforms would also start requesting some documentation from drivers as Uber does. Jane knows some other drivers and sometimes they discuss work. She also belongs to the online forums of the apps she uses and once participated at a demonstration in front of the office of Taxify/Bolt to protest against dynamic pricing. No one from the office came to talk to the protesters; however, free pizzas were sent out to them. Jane has heard some talk about establishing a union for the app-drivers, but until now no leaders for the movement have appeared and she is doubtful if drivers are actually able to fight against taxi apps, as *“/.../what damage could a small breeze do to the fence anyway /.../”*.

Jane drives a leased car, which will be hers in two years. Until then the payments for rent and other expenses are quite high, so something has to give to make ends meet. A cost saving strategy for Jane is to only pay income tax once a year (but not social security contributions). Although this is a legal option in Estonia, paying only income tax is usually meant for those people who earn extra (occasional) income this way and get social security coverage from alternative sources. As taxi platforms are Jane's only source of income (and she only pays income tax), she does not have health insurance and she is not saving for a pension nor has she other social guarantees. Nevertheless, she does not seem to be worried about that too much and is not looking for alternative jobs. With her income, she also supports her mother who she lives with. She seems a bit doubtful (maybe lacking enough information) about whether alternative ways of paying taxes (e.g. through her own company or through the entrepreneur account for natural persons) might be more reasonable options for her.

Therefore, registration in the **public social security system** varies among the interviewees. One main pattern among the interviewees (albeit not generalizable to the whole population of Uber

or Bolt drivers) is that inclusion comes with the “main job”, a stable position in the labour market, or as a result of a special condition granting access to the public health care system (e.g. health problems, student status) or from their own small (usually one-person) company.

2.4 Perception of the impact of the pandemic

During the focus group interview on 6 November 2020, Uber drivers highlighted that the most important development during the pandemic was the **further diminishing role of Uber** in Tallinn. The drivers agreed that the number of clients has decreased on all platforms, but Uber has become an especially marginal player in the field. This is firstly related to their clients being overwhelmingly tourists: *‘the road to the airport is getting grassy’*, as one of the Uber drivers put it. Furthermore, the drivers contemplated whether Uber has ‘given up’ on Tallinn: they closed their Tallinn office in May 2020. **Communicating with Uber** is now done via the Polish office, which is **rather difficult** for the drivers – answers can take several weeks. What is more, as no office worker is aware of the actual situation in Tallinn, they seem to be detached from the local market realities and, as the drivers argued, both Uber and the drivers lose.

Another effect of the pandemic was **decreased rates** for rides by all of the taxi platforms: Uber was the last to lower them, but they still did. One of the drivers emphasised that related to the decreased number of clients (and lack of some client groups), drivers who want to earn a decent income also have had to change their driving time strategies. It seems this has **reduced the working time flexibility** even more: certain hours that previously enabled them to earn decently (like times when flights and ships left) do not anymore. It also means that driving via taxi platforms is increasingly difficult to do as a side-job, as your main job requires you to be present at specific times.

Uber drivers also emphasised that Airbnb actually operates as a free market platform, as hosts can set their own prices, but taxi platforms do not, as prices are set for them. Furthermore, the drivers seemed to feel the **increasing amount of control exercised over them** that can end in platforms blocking drivers without due process. As one of the participants explained:

I had a situation recently. The client made a complaint, gave me a rating of 1: the driver is not wearing a mask. I got a letter from Uber saying that one more complaint about not wearing a mask, and it will be the end [you will be blocked].

Although Uber informs the drivers regularly that wearing masks is mandatory (unlike other taxi platforms), in Estonia wearing it during the time of the focus group was still rare, even in the service sector. Another driver has had the opposite experience with clients: he wears a mask and some associate this with him being ill. He also stated that the only thing the driver actually can choose is whether to drive or not, everything else is controlled by the platform:

All the platforms try to wriggle out of being employers. If you look at the contract, what is written there: the platform is basically absent. Everything is the responsibility of the driver. They [the platform] do not know anything. In practice, if you make a couple of ‘wrong moves’, you will get [no orders, or even blocked from the platform].

One of the drivers in a focus group emphasised that Uber does offer some kind of health insurance related to Covid if you have ‘diamond driver’ status and you get a doctor’s notice that you have

Covid-19 (and, possibly, also some other health issues), but the drivers all seemed to be sceptical about whether it would actually be possible to get this. Luckily, none of the focus group participants had fallen ill with Covid-19, or at least they did not mention it and when asked if a lot of drivers have been ill, they did not think so.

To sum up, it seems that platforms were seen by the focus group participants as untrustworthy partners, as they do not consider the driver's feedback, and their systems, even if in place, do not function properly (especially after Uber shut down the local office). This scepticism towards the platforms might have increased during the pandemic, as generally the world can seem a bit more insecure. Nevertheless, the drivers were not very demanding towards the platforms, but just wanted them to 'play fair': at least **to establish some kind of due process**, as currently the fear of just getting blocked was strong (two of the participants were actually already blocked by Bolt, as they spoke out against some practices of that platform). In general, we can conclude that the workers were undergoing difficult times because of the pandemic situation.

2.5 Alternatives to the current status quo

Although the interviewees did not highlight many possibilities that they saw to improve their situation as (platform) taxi drivers, there were some ideas brought up that might deserve further discussion. Although the collective mobilisation of platform workers as a way to improve their working standards was one of the topics brought up by some drivers, we already discussed the difficulties or particular barriers related to unionisation in Tallinn. As one interviewee mentioned, she has heard of some talk about establishing a union for the app drivers, but until now no trustworthy leaders for the movement have appeared. She does not feel very positive about the benefits it could bring, as she states "*what damage could a small breeze do to the fence!*" [U_F_TLL_13], likening potential unionising efforts to a breeze that could not possibly alter the general course of social norms and practices. While she seems to at least want such a breeze to turn into a more serious storm, the extreme capitalist viewpoint of another driver, who favours minimal regulations and interference by the state, sees no possibility for any collective action against the platforms. Instead, he sees the possible unionisation efforts as an opportunity for those not involved to earn more, stating:

Being a taxi driver is a cowboy-like job. You are alone really /.../ Everything depends on yourself. [U_M_TLL_15]

Although the app drivers saw that many taxi clients are extremely price sensitive, so that even a tiny price difference matters to them, it was still highlighted that a fixed price floor for rides might be one option to end the downward spiral of prices:

...like price ceilings, price floors should be established, so that the driver could ask for fair fee. [U_M_TLL_5]

What else, beyond setting price floors, could help fairer practices to emerge? The idea of a city-supported communal taxi-app was introduced:

Well, there could be a commonly administered application, whereby the city pays the drivers directly and then the drivers are driving as public transport. It would be free of charge for the customer, as I would not need this one euro from them. The city could pay

the wages and other costs. Now, of course, this will not happen, I am sure. But I wanted to simply mention it. [U_M_TLL_9]

This is to be understood partly in the context of free public transport, which is the case in Tallinn. Therefore, the idea would be to turn the private entrepreneurs (or at least some of them) into public service providers. Interestingly, of course, this also points to the idea of someone securing the cost of living – and the dignity of the driver's work would be restored. This also shows the view of drivers who would like to drive, or would not mind driving, but find it unfairly paid.

Another solution to restore the dignity of the taxi driver's profession involves the idea that given driverless cars in the future, the job of drivers will become redundant altogether. Another example drivers mentioned asked why shouldn't rental cars be cheaper than ride-hailing because "*you only exploit the car, not the car with a driver*" [U_M_TLL_5]. The need to share cars would be there in both cases, whether with driverless cars or with ride sharing, as according to that interviewee, more and more people understand that it is not feasible to own a car, or at least it is not worthwhile to drive it in the city, for example, because of traffic jams and difficulties related to parking. The interviewee also pointed out that according to his observations, ride-hailing has not increased traffic in the city – there is no more demand for rides. To develop the idea further, if giving up private cars could mean there are less cars in cities, this might also mean more environmental sustainability at some point, as well as restoring the dignity of the drivers.

Perhaps more options should become available even in public discourse for other solutions to be realised.

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