PRISONERS ON WHEELS?

Report on
Working and Living
Conditions of App-based
workers in India
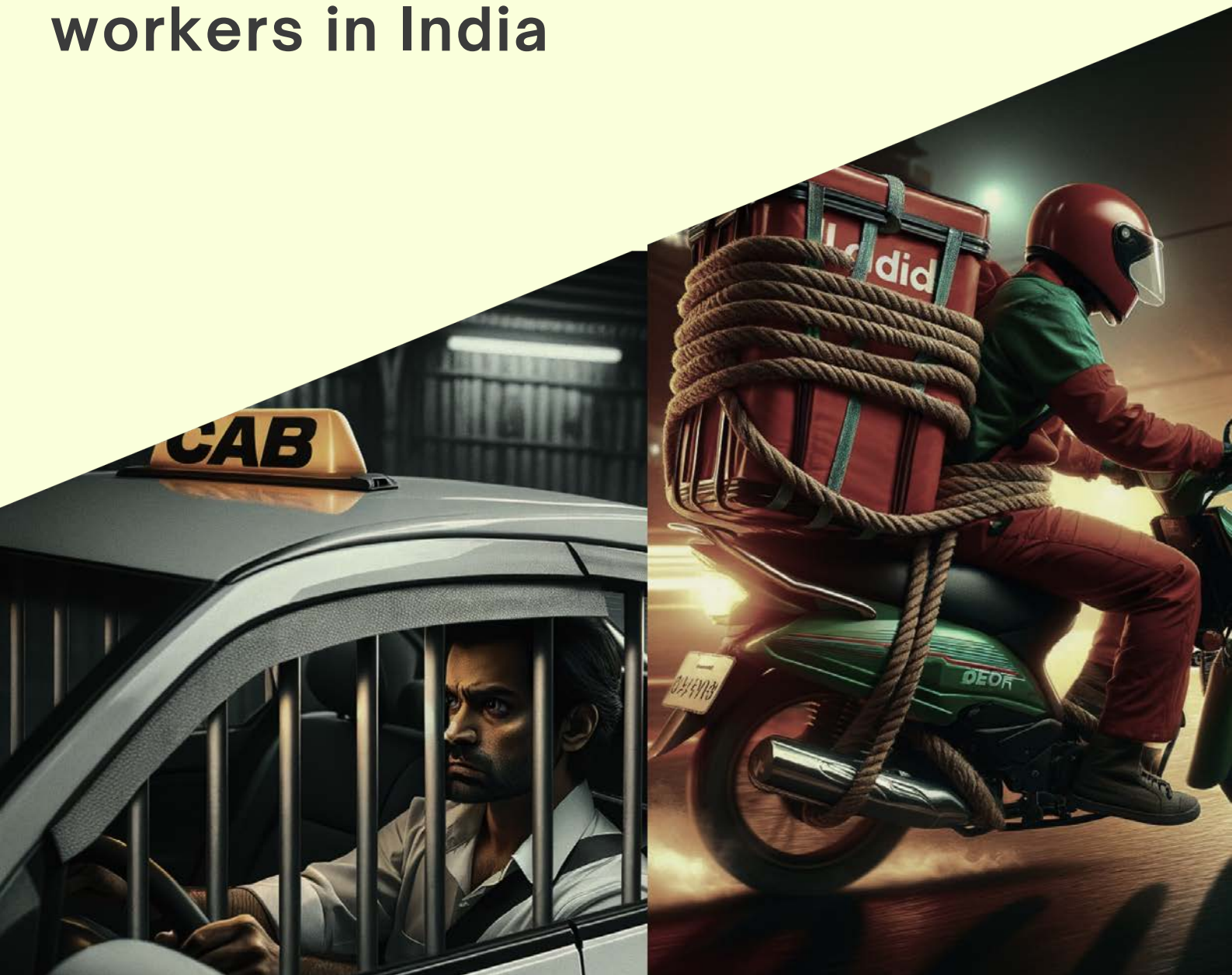
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ACKNOWLEDGEMENTS

FOREWORD AND NOTE BY PRINCIPAL INVESTIGATOR

Over the past decade, India's platform sector has grown rapidly. Today, it shapes the urban experience and is among the largest employers of young Indians. This industry however, is marked by something very peculiar. Although it is such a high profile industry - a sector about which we seemingly know a lot – in reality, we know very little about it. Simple questions such as: "How many Uber and Ola cars were on the streets of New Delhi yesterday?" Or "How many delivery workers are currently in operation in Bangalore?" Or "Have the number of Uber / Ola rides increased or decreased between February 2022 and February 2023?" will all remain unanswered today.

We can make two preliminary observations based on this paucity of data.

First, it is ironic that this scarcity of data is present in an industry in which all workflows are facilitated digitally. All of the data queried above has indeed been captured. As a matter of fact there is, simply put, an abundance of data that is being captured and held, but none of it is accessible to anyone except the companies. This is ironic.

Second, without data, it is impossible to formulate robust policy. If this data were made available, it could easily lead to the formulation of excellent urban transportation policy. In fact, platform data might well be the basis for generating good public policy that serves the larger public good beyond just the platform sector. Over the last decade I have heard the answer "But we don't have any data" far too many times from too many policy makers, legislators and ministers. The data is there. It's just not being demanded.

New laws aimed at regulating this industry are currently being prepared by the Central and many state governments. We offer this research study in light of such a scarcity of data and the emergent demand for fair regulation.

We conducted this study because without clear reference data the workers in the industry would be at a disadvantage as governments across India move towards formulating regulatory policy. This research then is an attempt to overcome this problem of creating policy without data. This study gives back to the drivers and riders what is already theirs - - data about their daily work.

With over 10,000 surveys across eight Indian cities, this research set out to be the most comprehensive study of the sector to date. We hope that we have at least succeeded partially and have set a base standard for data in this industry. In short, all future data, we hope will rise above the standard that we have set.

In New York City, from where I write this note, I can get the answers of all such questions, in a matter of seconds with the proverbial click of a couple of buttons on my computer. This is because the city has simply mandated that the companies hand over this data for the privilege of being allowed to operate in the city. The city then summarizes the data, and puts it out for public use. This should be where we are headed for. If this research study is the first step towards establishing a standard for publicly available data in formulating policy, then it would have done its job.

Prof. Biju Mathew
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BACKGROUND AND INTRODUCTION

In the past few years, there has been a notable transformation in the worldwide employment landscape, marked by the emergence of 'gigification' or the widespread adoption of the gig economy model, fundamentally altering the nature of work, leveraging on-demand gig workers, allegedly, to enhance efficiency, flexibility, and overall progress.

What is gig economy?

If you've ever utilized an app to summon a freelance taxi driver, order food, or purchase a homemade craft, chances are you've engaged in this sector of the economy. The "gig economy" typically evades the conventional employee-employer model, where "professionals" are hired for specific tasks or projects and compensated on a proportional basis. This encompasses roles such as software engineers, website developers, freelance content writers,project-specific consultants, drivers and delivery agents.

A gig economy is characterized by the employment of workers on a flexible, temporary, and contractual basis. The definition of gig work varies based on the nature of the work, the arrangement, and the legal framework. These different definitions lead to different gig workforce numbers ("What is a gig worker?", 2020). The gig economy can be broadly categorized into service-based and knowledge-based gigs. Service-based gigs involve low to semi-skilled workers, including delivery agents and individuals providing services through on-demand platforms. On the other hand, knowledge-based gig work encompasses semi to high-skilled jobs, such as those of consultants or data scientists. Gigs can be present at all levels of an organization, spanning from low to high-skilled workers and encompassing both part-time and full-time positions, thus covering the entire spectrum of pay scales. (Frazer, 2019).

Although the term "gig work" originates from the West, referring to flexible, freelance and part-time jobs, in the Indian context, all major trends including the current study establishes that the app-based workers (cab drivers and delivery persons in this study) in the platform based industry are "more than full-time workers", who depend on this work for their overall sustenance and survival and do not view this work as a mere "gig".

It is therefore that we propose the use of the term "app-based workers" or "gig and platform workers" both in the policy and public discourse.

According to a report presented by the Ministry of Labour and Employment in 2020, a gig employee is described as someone who engages in income-earning activities out of the doors of a traditional organization-employee relationship, often working in the casual sector.

According to a McKinsey study, "independent workers" fall into four categories:

1. **Free agents**, who willingly choose independent work as their primary source of income.
2. **Casual earners**, who opt for independent work to supplement their income by choice.
3. **Reluctants**, who rely on independent work for their primary livelihood but would prefer traditional employment.
4. **Financially strapped,** who engage in supplemental independent work out of necessity.

Public policy-makers are tasked with the challenge of ensuring the satisfaction of all these groups within the gig economy.

This may involve adjusting policy frameworks to align with the demands of the digital age.

Challenges in gig and platform economy:

● *Income Instability:* Gig and platform workers often encounter income fluctuations, adding complexity to financial planning. The unpredictability of the gig and platform economy serves as a double-edged sword.

This inconsistency often necessitates these workers to overwork, implement careful financial planning strategies to effectively manage expenses, save for the future, and navigate through financial uncertainties.

● *Lack of Employment Benefits*: Gig and platform workers frequently lack access to traditional benefits such as health insurance, retirement plans, and paid leave. Unlike those in traditional employment, these workers typically have the responsibility of securing and funding their own benefits. This absence of safety nets can leave them exposed and vulnerable during periods of illness, injury, or retirement. The lack of comprehensive benefits is a significant concern that stakeholders need to address, to safeguard the well-being of gig and platform workers.

● *Job Insecurity:* The lack of long-term contracts or job security can generate anxiety and uncertainty for gig and platform workers. Living without the assurance of a stable job and a regular paycheck, these workers often grapple with concerns about future income and financial instability. This underscores the importance of establishing social safety nets that address the challenges presented by the gig and platform economy.

● *Legal Protections:* Gig and platform workers frequently find themselves without the legal protections afforded to traditional employees, making them susceptible to exploitation. The legal landscape for such work and the regulatory framework for app-based tech companies is still developing, leading to challenges for these workers in asserting their rights, including fair compensation, workplace safety, and protection from discrimination. Advocacy efforts and policy changes are essential to guarantee that gig and platform workers receive the rightful protections and benefits they deserve.

Mental Health Implications: The persistent hustle and unpredictable income in the gig and platform economy can have adverse effects on mental health, requiring the adoption of coping strategies. The demands of this industry can be mentally draining, with the constant need to securenew gigs, manage finances, and navigate uncertain work conditions contributing to stress, anxiety, and potentially depression, also reflecting in our present survey report findings.

Acknowledging the mental health implications of gig and platform work is therefore crucial, and the government and companies should therefore factor-in the workers' well-being as a major consideration in the policy formulation processes.

INDIA'S JOURNEY TOWARDS "GIGIFICATION"

The gig and platform economy in India has witnessed a significant growth and is expanding rapidly, as also indicated by various statistics. According to a report from the International Labour Organization (ILO), India stands as the second-largest gig economy globally, with approximately 56% of all gig workers in the Asia-Pacific region operating within the country.

TeamLease Services too asserts that about 56% of new jobs in India, spanning both blue and white-collar sectors, are emerging from the gig economy (Pant & Krishna, 2020). According to Ernst & Young, nearly one in four gig workers worldwide operates in India (Nanda, 2019).

A January 2020 projection by ASSOCHAM had already anticipated that India's gig economy would experience a compound annual growth rate (CAGR) of 17%, reaching $455 billion by 2023.

Nasscom's report too aligned with this projection, that foresaw a CAGR of 17%, resulting in a gig workforce to have already reached a figure of of 23.5 million.

According to a report presented by NITI Ayog in 2022, the gig economy system in India has experienced significant growth, with an estimated 8 to 18 million jobs as of now. This number is projected to soar to over 90 million jobs in the non-farm sector constituting around 30% of the country's workforce within the next eight to ten years.

According to the Boston Consulting Group (BCG) too, it is estimated that the Indian gig economy could potentially generate up to 90 million jobs in non-farm sectors, According to them, this long-term potential of the gig economy could comprise of the following:

● Skilled and semi-skilled jobs (around 35 million) within industry sectors;

● Shared services roles (around five million) like facility management, transportation, and accounting;

● Household demand for services (around 12 million);

● Unskilled jobs (approximately 37 million) across various sectors of the economy;

● Retail, Transportation and Logistics could alone account for over 70 million of the potentially 'gigable' jobs.

India's adoption of the gig and platform economy is attributed to the increasing availability of affordable low-skilled labor. The abundance of this low-skilled labor allows employers to hire workers as needed and reduce costs. Initially popular among blue-collar workers, the gig and platform economy is witnessing the emergence of a white-collar sector as well, especially in the aftermath of the coronavirus lockdown ("COVID-19 prompts workers, corporates to adopt gig economy," 2020).

Examples of blue-collar work in this economy include delivery personnel, drivers, and cleaners, while white-collar roles encompass digital marketers, bloggers,

designers, and more. With the ascent of the Indian gig and platform economy, an increasing number of startups, corporations, and professional services are tapping into the potential of gig and platform workers. (Bhattacharya, 2019).

In this sector in India, regulation is limited, as platforms typically categorize workers as 'contract workers,' denying them employee benefits such as access to minimum wages, overtime compensation, annual leave, severance pay, pension pay, employee provident fund (EPF) accounts, and anti-discrimination laws (WageIndicator Foundation, 2020).

Historically, gig and platform workers were not covered by specific laws and regulations, relieving companies of the obligation to provide social security (Jalan, 2020). This results in diminished bargaining power, further compounded by the lack of redressal mechanisms

and the informal nature of the gig and platform economy. Even recent legislative changes through the Code on Social Security have been criticized for falling short of meeting requirements and expectations.

Furthermore, activists, academics, and unionists have highlighted the issue of gig and platform workers being subjected to algorithmic surveillance, eroding transparency and accountability between workers and platforms (Singh, 2020). This surveillance can impact workers' daily wages and may foster discrimination (Ibid). Aneja and Zothan (2020) observe that the design and structure of platforms isolate workers, making it challenging for them and unions to collaborate. Nonetheless, some workers have found ways to coordinate and support each other through social media groups.

Code on Social Security 2020

The introduction of the Code on Social Security in 2020 aimed to safeguard the rights of gig workers by providing them with social security protections. Comprising nine new regulations, the Code seeks to enhance coverage and extend benefits uniformly across the organized and unorganized industries within the four labor codes (Kasturirangan, 2020). It has broadened its coverage to include unorganized, fixed-term, platform, and gig workers, along with inter-state migrant workers, in addition to contract employees (Mishra, 2019). By explicitly defining 'gig worker' and 'platform worker' in the legislation, the government has officially acknowledged the gig and platform economy (Pant & Krishna, 2020).

he Social Security Code mandates companies, including ride-sharing platforms, food delivery services, grocery delivery, and e-commerce websites, to allocate one to two percent of their gross annual turnover to social security coverage for their employees, encompassing provident funds, life insurance, gratuity, etc. Although these provisions may benefit workers in the long run, concerns exist regarding potential reductions in current income, especially since many ride-sharing and e-commerce platforms claim that they are not yet profitable and may shift extra costs onto their employees (Shekhar, 2020).

While this legislation represents a step in the right direction, it raises several concerns.

There is no legal mandate or universal coverage, and there lacks a time frame or accountability mechanism for complying with its provisions. Critics argue that the Code is "vague with lofty promises", with unanswered questions about its implementation and minimal accountability (Shekhar, 2020). Additionally, there are worries that the Code fails to address the real problems faced by gig and platform workers, particularly the uncertainty and fluctuations in

income. The Code's omission of issues such as smart identification cards and algorithmic surveillance, lack of data transparency along with diluted penal provisions, has also been criticized (Shekhar, 2020).

Despite the potential of India's gig and platform economy, it faces formidable challenges and concerns not necessarily shared by developed global economies like the US and Europe. Addressing these challenges requires collaboration among industry bodies, government institutions, and organized professionals to ensure that the benefits of the growing gig economy are equitably shared among all stakeholders.

METHODOLOGY

This study was conducted from April 2022 to April 2023. It is one of the largest studies on gig and platform workers in the world in terms of the length of the questionnaire, size of the sample and geography covered with over 10000 cab-drivers and delivery persons each, across 8 cities of India - Delhi, Lucknow, Jaipur, Indore, Hyderabad, Bangalore, Mumbai and Kolkata, each of whom were surveyed on over 50 questions, spanning on the socio-economic profiles of the workers, their working conditions, living conditions, physical and mental health conditions; and other issues like incidence of violence at work and ID deactivation faced by them.

Pilot study was conducted to test the questionnaire, responses, sampling and methodological tools across 1000 respondents in Delhi, Lucknow and Hyderabad (May 2022-July 2022). The pilot survey was conducted both, face to face as well as telephonically, using samples identified on-ground, and with the help of IFAT networks.

As a result, several iterations in the questionnaire were made, and face-to-face on ground surveys and focused group discussions were finalized as primary sources of data collection. Techniques of purposive and snowball sampling were deployed to identify the respondents.

The team also collected around 1700 screenshots of real-time rides and data points spanning 50 drivers across 3 cities (Delhi, Jaipur and Hyderabad) to investigate the issue of unfair and arbitrary commission rates and deductions from driver earnings by the ride-hailing cab aggregator companies.

The data is both heavily quantitative (given the large sample sets) and at the same time captures extremely qualitative aspects of the workers's work and lives. While the screenshots data of the drivers' earnings is purely quantitative data, the focused group discussions supplements this study with enriching qualitative and testimonial accounts of the workers.

For cab drivers, samples were identified from spaces like petrol and CNG pumps, parking lots, airports waiting zones of Ola and Uber. Randomized, long paid rides were also taken by our surveyors and the survey was conducted on the way in some instances.

Some high demand waiting zones of these cabs outside busy complexes and malls were also identified during the pilot study itself. It was found that the cab drivers were freer to talk in the afternoons, during non-peak hours, and some of them even agreed to talk in the late night hours when the demand was not too high.

In case of delivery persons, samples were identified outside malls, restaurant complexes, and informal (undedicated) waiting zones of these delivery persons where they found it easier to park their 2-wheeler near the eating joints, and where they are likely to receive more orders from, especially during meal times - lunch, dinner, snacks and breakfast. They were able to talk to us more freely in the non-meal hours, and in case they could not finish the survey due to sudden bookings and orders, at some instances, they would give their phone numbers and would finish the survey telephonically with our surveyors at convenient times.

IFAT team, especially the state teams of Hyderabad and Jaipur helped in a major way, both in terms of data collection, as well as in identifying and surveying the respondents, where most of the surveyors were drivers and delivery persons themselves. Interestingly, even in other cities where the survey was being conducted independently by PAIGAM like in Delhi, Lucknow and Mumbai, some of the respondents themselves got so interested in the study, that they volunteered to be the surveyors and part of the study themselves. This made our study truly participatory and representative of the worker respondents in question. Therefore, the most interesting aspect of the data collection process was how the respondents - both cab-drivers and

delivery persons, took a keen interest in the study, fearlessly voiced their grievances and did not even hesitate in canceling their next rides or duties to finish the surveys.

Like in most studies, we anticipated the reluctance of the respondents in giving their time and sharing their data, but it was heartwarming to witness the cooperation from the respondents. This was also due to the sensitized training that our surveyors underwent, who spent adequate time explaining the objectives of the study and about the union partnership and in forming a rapport with the respondents. As a result, the respondents even expressed gratitude for raising their issues and concerns through this study. Most of them were willing to even contribute their app data screenshots for the study, and sit for the focused group discussions for as long as we required.

Limitations of the study

There are some key limitations of the study. At various instances, the rides/bookings of the respondent would come during the survey, due to which the survey could not be completed in one go, and had to be followed up, either telephonically or in repeated interactions. Then, there was some hesitation on part of some of the respondents in reporting their social identities like caste and religion. There could also be some under-reporting or over-reporting when it came to the question of the income and expenses data.

Finally, the field was not always conducive for data collection. Despite the availability of permit letters with our surveyors, authorities at CNG pumps and the airport constantly intervened and tried stopping the survey process. One incident is particularly striking in this regard. At the IGI airport, terminal 2, Ola representatives hijacked the survey process and manhandled the surveyors, stating that "even if you bring a permission letter from the PMO, we wouldn't allow this survey to take place, as Ola has bought this space on lease

and only our rules will operate here". They even threatened the Ola cab drivers who had agreed to be our respondents stating that "those who have participated in this survey or are found doing so will be blacklisted from the company, there will be a complaint against them and their IDs will be blocked instantaneously". Such were the challenges that our team had witnessed, and it becomes hard to imagine what the workers go through everyday at the hands of these companies, their representatives and other authorities.

WORKING AND LIVING CONDITIONS OF APP-BASED GIG WORKERS IN INDIA

EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

This report is based on the survey of 5302 cab drivers and 5082 delivery drivers, across 8 cities of India viz. Delhi, Lucknow, Jaipur, Indore, Mumbai, Kolkata, Hyderabad and Bengaluru.

The report is supported by the University of Pennsylvania Institute for the Advanced Study of India (UPIASI), Annenberg School for Communication, University of Pennsylvania and FES India, and conducted by PAIGAM (People's Association in Grassroots Action and Movements) with the help of IFAT (Indian Federation of App-based Transport Workers). Prof. Biju Mathew (Rider University) is the Principal Investigator and Dr. Akriti Bhatia worked as the Research Director on this report. The primary objective of this report is to highlight the working and living conditions of app-based cab drivers across India (primarily attached to Ola and Uber taxi-hailing companies) and focuses on the economic, social, psychological and health aspects of these workers across the aforementioned 8 cities of India.

The report captures trends of earnings and working conditions among these app-based cab drivers through an extensive and rigorous on-ground survey comprising of over 50 questions. The researchers also collected close to 1700 screenshots of real-time rides and data points from 50 drivers across 3 cities (Delhi, Jaipur and Hyderabad) to investigate the issue of unfair and arbitrary commission rates and deductions from driver earnings by the ride hailing cab aggregator companies.

The larger aim of this report is therefore, to bring into sharp focus, the issues of the workers in the gig and platform economy through solid, credible, evidence-based data that exhibit key revelations about their earnings, expenses, working conditions, physical and mental health conditions; and social and other challenges.

This report therefore, endeavors to build a credible research base of platform workers in India that will be useful to academicians, labour rights activists, unions, journalists, lawyers and policy-makers alike.
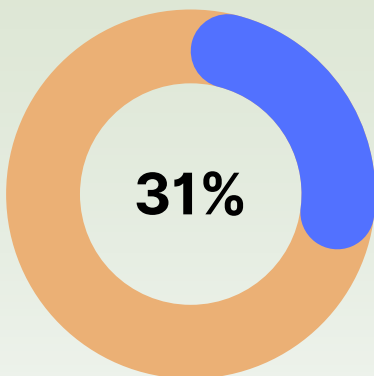
KEY FINDINGS-I (Cab Drivers)

Hours spent driving

Over **83%** drivers are working for over **10 hours a day**, close to **60%** are working for **over 12 hours a day**, and a glaring **31%** drivers are working for even **over 14 hours a day**. A close second was 27.5%, who worked between **12-14 hours a day.**
Almost **one fourth** of the drivers work between **14-16 hours a day**.
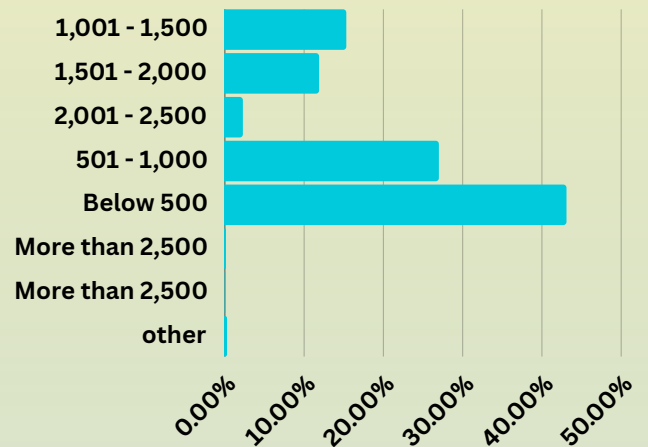
60%
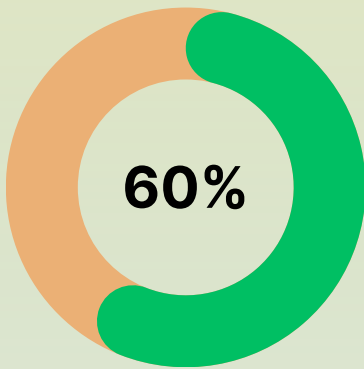
Drive over 12 hrs/day

31%

Drive over 14 hrs/day

Net earnings in a day through the app work

**43.10%** of the respondents **earn below 500 INR a day** after deducting all costs (food, fuel, etc.)

Effect of customer behavior on Driver

According to the data, around **72% of the respondents reported that the issue of customer behaviour does affect them** in some way or another.
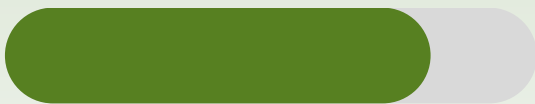

No
28.28%

Yes
41.51%

Somewhat
30.21%
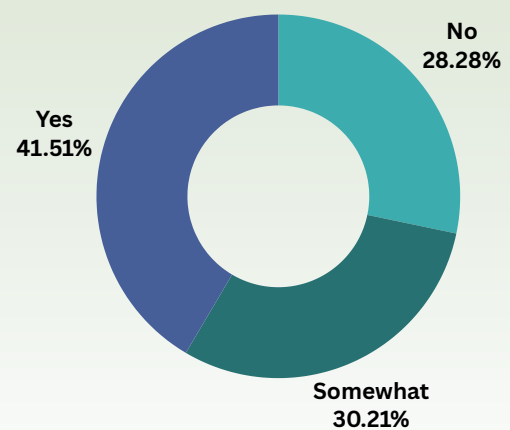
Weekly Offs

A whopping **40.7%** of respondents said they **do not take a single day off in a week.**
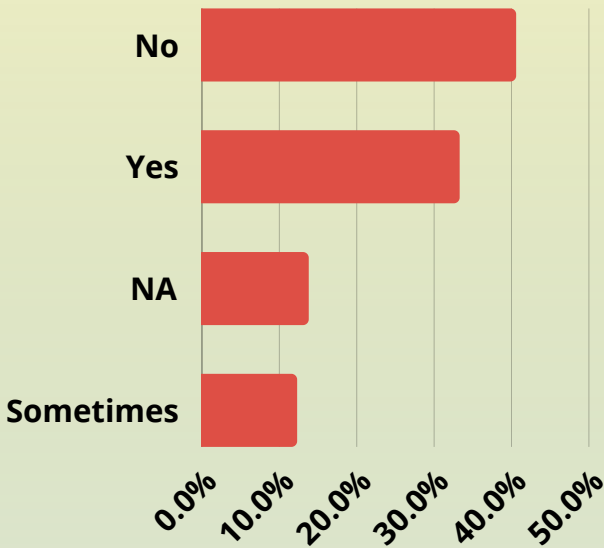

Kilometers travelled per day

A majority (36.8%) reported that they travel **150-200 kilometers in a day** for work. **28.5%** even reportedly drive **200-250 Kms** every single day.


Majority drive over 150-200 Kms per day

Social Category and working hours

61.7% SCs and 60% STs reportedly work for over 14 hours a day, while only 16% of the drivers belonging to the unreserved category are working for the same number of hours, indicating that respondents from the marginalized sections have higher burdens and responsibilities, leading to their self-exploitation.

Legend:
- less than 8 hrs
- 8-10 hrs
- 10-112 hrs
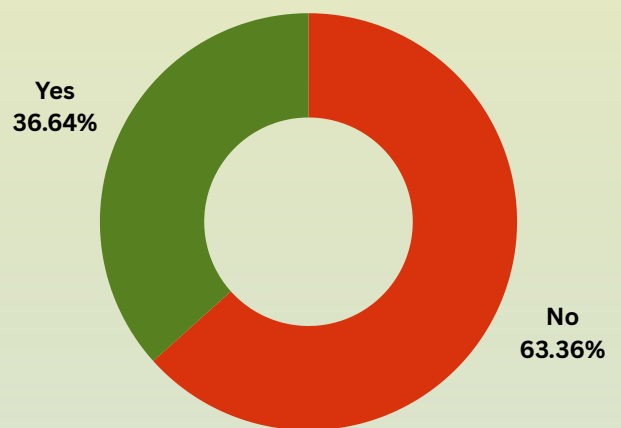- 12-14 hrs
- more than 14 hrs
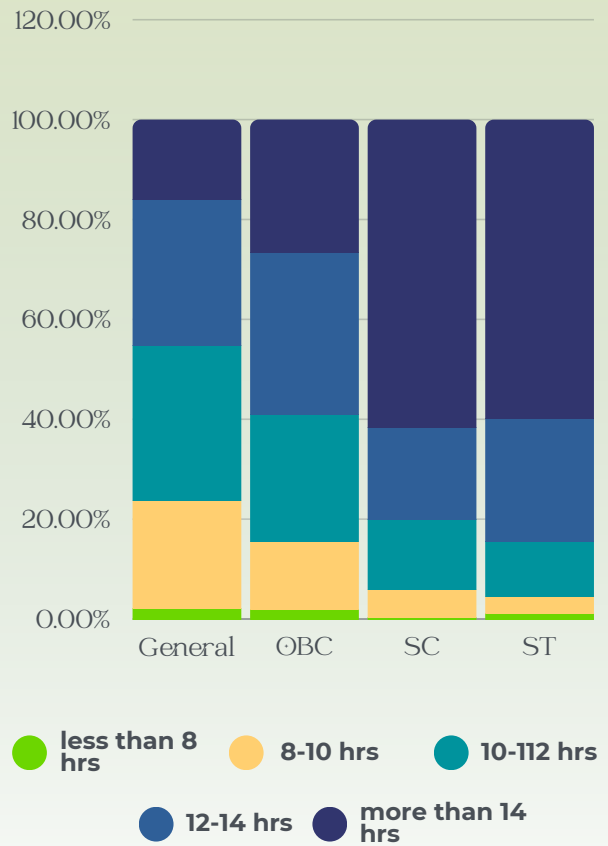
Difficulty in managing expenses

Upon analysing drivers' net earnings and expenditures, **72.2%** of the respondents reported that they are either somewhat finding it difficult to bear the household expenses or with certainty that they are not able to meet their expenses with their current levels of earning through this work. **56.7% responded in the affirmative** when asked if managing their expenses is a problem.
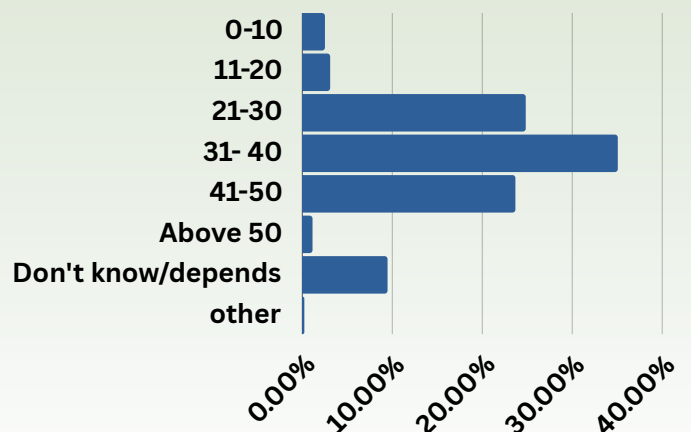
No
27.8%

Yes
56.7%

Somewhat
15.5%
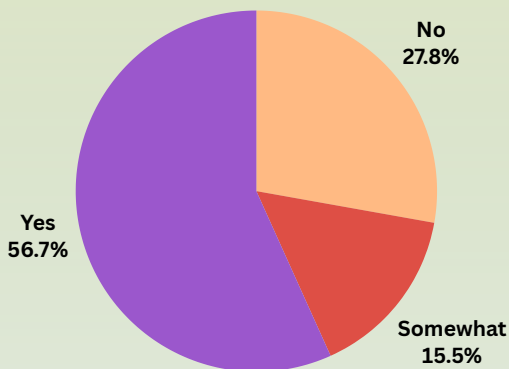
How many drivers are part of a union?

Almost **36.6%** of the drivers reportedly belonged to some union, while **63.4% of them revealed that they were not part of any union.**

Yes
36.64%

No
63.36%

Commission rate (%) per ride

Almost **35%** of the respondents believe that the companies are charging **31-40% commission** rate per ride.

|	
0-10	
11-20	
21-30	
31- 40	
41-50	
Above 50	
Don't know/depends	
other	

0.00% 10.00% 20.00% 30.00% 40.00%

Company deductions from drivers' earnings

68% respondents reported that they faced either "unexplained" and "arbitrary" deductions due to skewed app algorithms; deductions due to arbitrary commission rates charged by the companies or arbitrary deductions on online payments.

**3 major ways in which companies deduct from drivers' earnings:**

1. Arbitrary deductions through app algorithms

2. Arbitrary deductions on online payments

3. Arbitrary commission rates

Unexplained and arbitrary deductions through company algorithms

68%
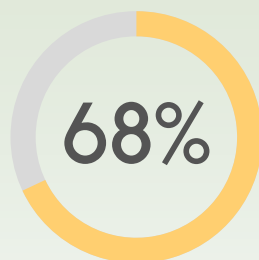
Satisfaction with current fares

A vast majority (**80.3%) of the respondents are not satisfied with what they are being offered** by the cab companies as the base fare/current fare.

Yes
9.2%

Somewhat
10.5%

No
80.3%
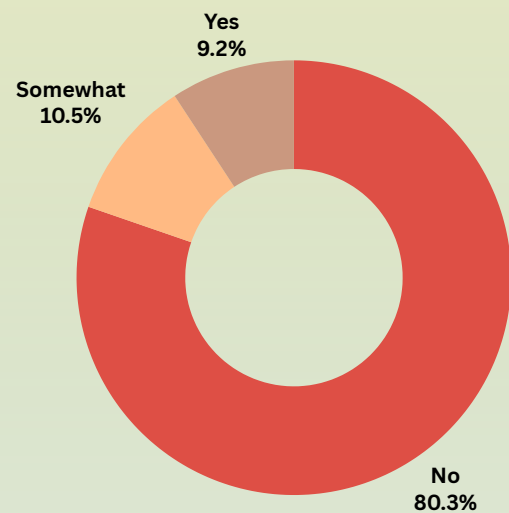
Average sleep time

Our survey found that **79.4% of respondents slept for a moderate amount of time (5-7 hours), 12% barely slept (2-4 hours)**, and only 8.8% slept adequately (8 hours or more).

Average sleep time: 5-7 hrs

Quality time spent

Majority of respondents **(66.6%) have little to no leisure/quality time to spend with their families.** The question on leisure time entailed the ability to spend time on something as basic as spending time with one's children which appears to have become a matter of privilege for these drivers.
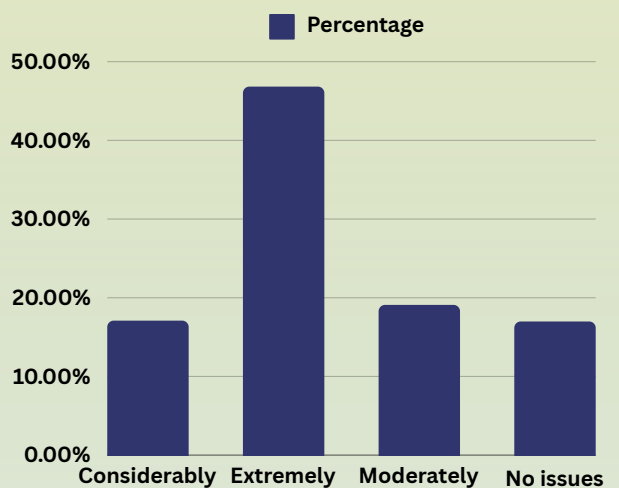
Nearly Negligible Family Time

Violence at work

According to the data, **47.1% of the respondents reported that they have faced some kind of violence at work.**

Yes
47.10%

No
52.90%

ID Blocking and Deactivation

83% of the respondents said that the **issue of ID block or deactivation affects them negatively**.

**46.8%** of respondents feel **extremely affected** by ID blocking.

Percentage

50.00%
40.00%
30.00%
20.00%
10.00%
0.00%

Considerably Extremely Moderately No issues
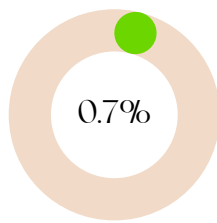
Physical & Mental Health Issues

86.5%

**reported
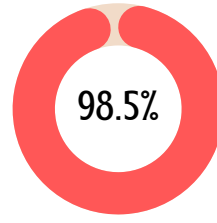knee/leg/foot/back/head pain**

The survey found that only **0.7%** of respondents reported **no physical health issues** due to work, while only **1.5%** reported **no mental health issues** related to this work.
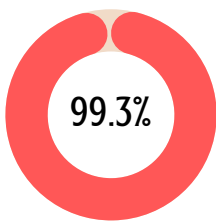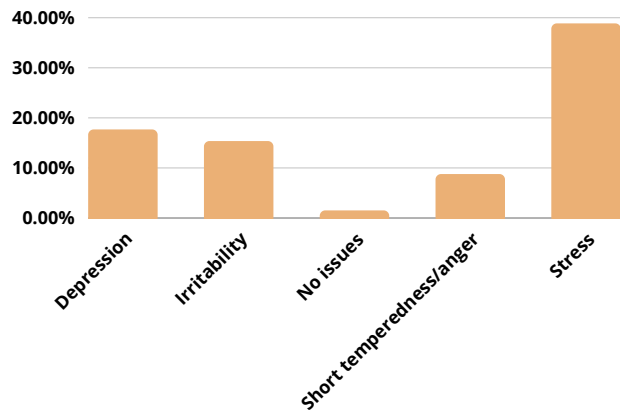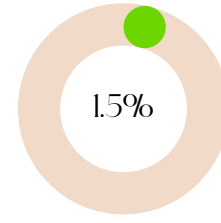

99.3%

Physical Health Issues

0.7%

No Physical Health Issues

98.5%

Mental Health Issues

1.5%

No Mental Health Issues

Additional Compensations demanded by cab drivers

According to the data, **69% respondents** felt that the companies should compensate them on one or more of the following:
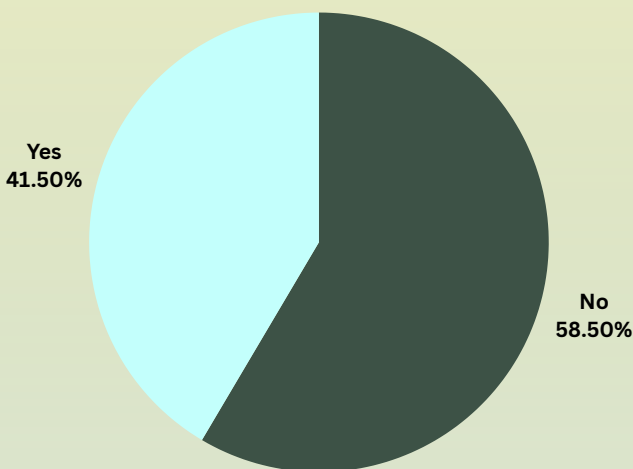
- **dry runs and long pick-ups or return rides**
- **excessive time spent in traffic**
- **hours spent on idle time or waiting time for rides**
- **cancellation by customers**
- **loss of income due to fuel and other price hikes**

Around 31% of the respondents also felt that they should be compensated for the cost incurred on mandatory training, buying uniforms, cab alarms, accessories, etc.

KEY FINDINGS-II (Delivery Persons)

Violence at work

According to the data, **41.5% of the respondents reported that they have faced some kind of violence at work.** 64.3% do not get support from companies when faced with violence.

Yes
41.50%

No
58.50%

Net Earnings in a day

According to the data collected, almost **32%** of the respondents reportedly earn between **INR 201-400** a day while almost the same percentage of respondents reported that they earn between **INR 401-600** on an average daily after deducting their daily expenses.
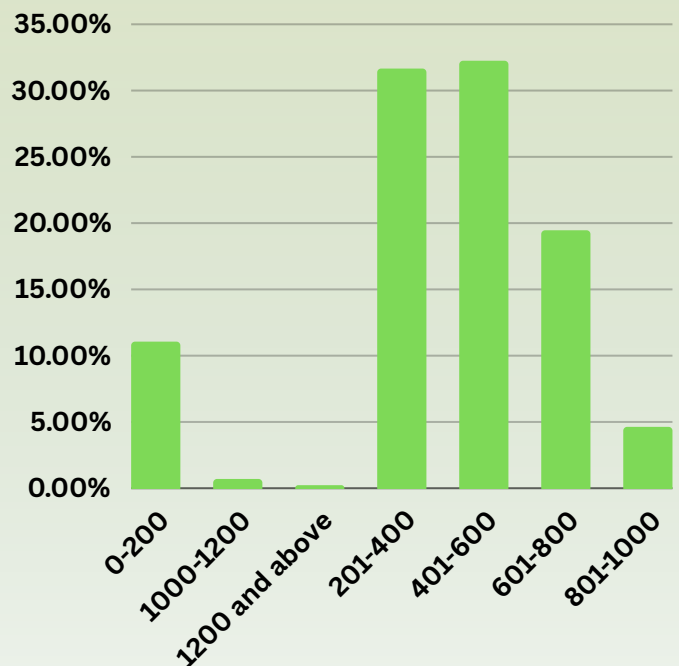
₹201-400

Monthly Net Earnings

34.4% of the delivery persons **earn less than Rs 10,000 a month** after deducting all their monthly expenses (maintenance, EMIs, challans etc.).
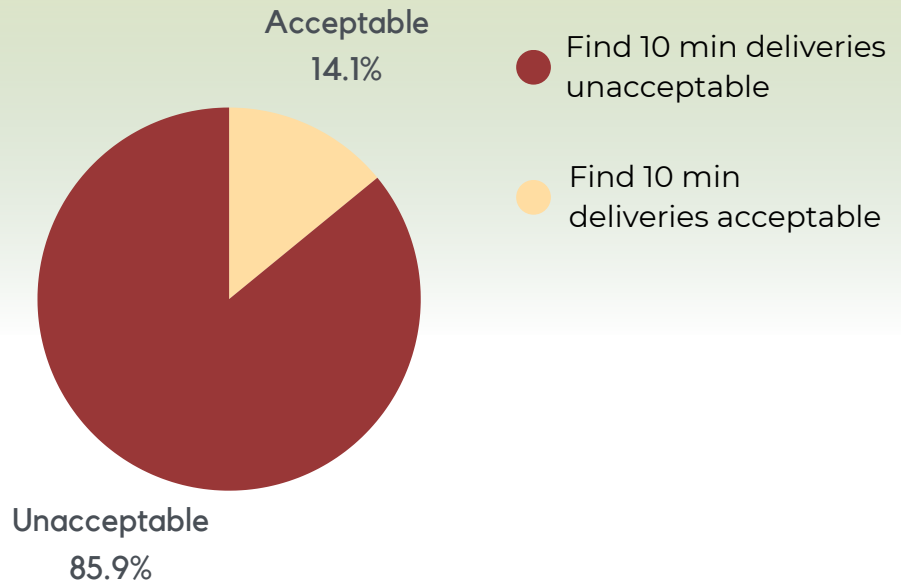
<₹10,000 per month

Issues of 10 minute instant deliveries

A whopping **85.9% of the delivery persons** said that the new policy of **10 minute instant deliveries is completely unacceptable** to them.

Acceptable
14.1%

● Find 10 min deliveries unacceptable

● Find 10 min deliveries acceptable

Unacceptable
85.9%

Daily minimum guarantee or incentives

47.8% of the delivery persons answered in the negative when asked if they get any daily MG (minimum guarantee) or incentives on meeting certain targets in a day.

No

Sometimes

Yes

0.00%   10.00%   20.00%   30.00%   40.00%   50.00%
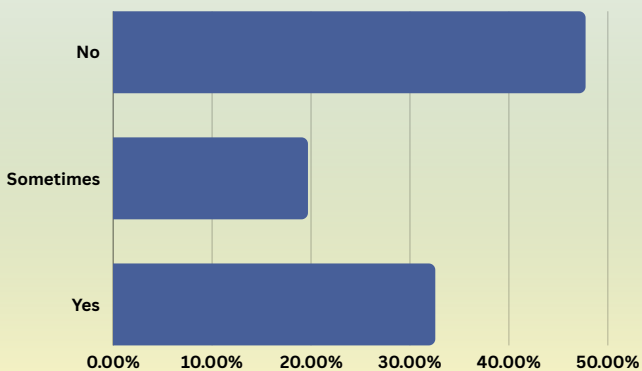
47.8% said they get no min. guarantee post target completion

Issue of ID blocking and Deactivation

According to the data, almost **87% of the delivery reported being affected with the issue of ID blocking** and deactivation in some way or the other.
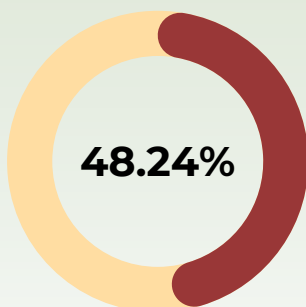
87% of delivery persons face ID Blocking

Weekly off

48.24% of the delivery persons reported that they are not able to take even one day off in a week.

48.24%

TAKE NO WEEKLY OFFS

Monthly Household Expenses

According to the data collected, **32.9%** of the delivery partners reported they spend around **Rs. 5,001-10,000 monthly** on their household expenses (including utilities - gas, electricity, water bills/groceries/house EMI's/education/medical bills).
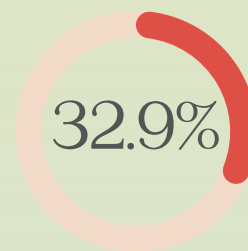
32.9% spend about ₹5001-10,000 every month on household expenses.

Working Conditions

44% reported that customer behaviour **affects them negatively**

44%

Distance Travelled Everyday

A majority of the delivery persons (50.7%) travel **101-150 kms in a day.**

Majority drive over 101-150 Kms per day

Part-time or Full-time Enagement

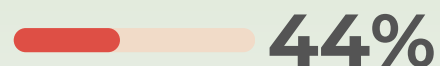**9.3%** of the respondents reported that they worked part-time. **Rest, 90.7% of the respondents are employed full time in these companies.** Out of the part-timers, 52.4% belong to Hyderabad.

91% are full-time workers

Waiting Time

42.8% of the delivery persons said that they had to wait/sit idle for 1 hour for the duties/orders in a day.

■ Grand Total
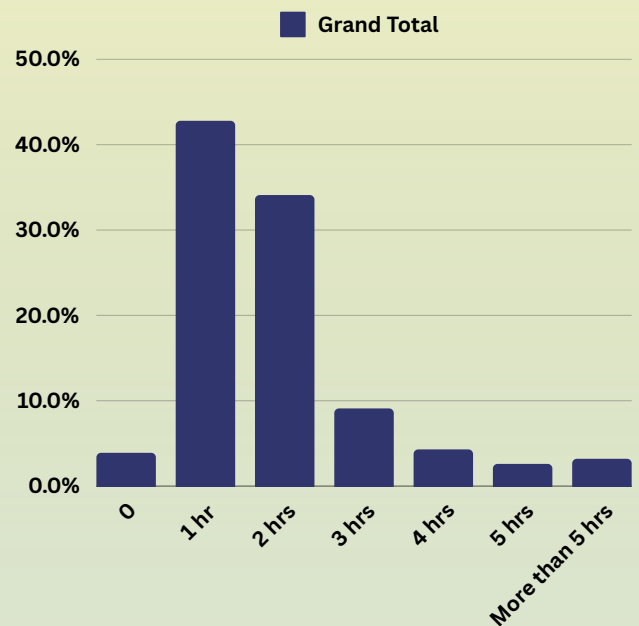
Quality time with family

49.8% of the delivery persons said they barely (**1-2 hours**) get leisure time to spend with their family and friends.

1-2 hours of Family Time

Working Hours

According to the data, 55% of the respondents work for 10 to 12 hours a day, around 20% of them work for 12-14 hours a day.

75%

Working over 10 hrs a day

Vacation time off

According to the data, **48.7%** of the delivery partners said they were not able to take enough time off for vacation or family visits in an year.

Yes
21.63%
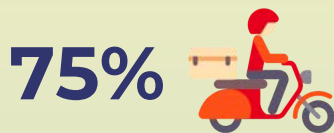
No
48.72%

Sometimes
29.66%
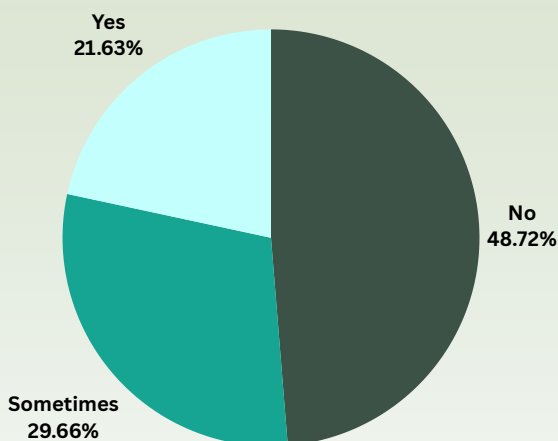
Challenges Faced while Meeting Expenses

As can be inferred from the data already provided, a majority of the delivery partners **(60%)** reported facing challenges in meeting their monthly expenses.

No
23.69%

Yes
59.95%

Somewhat
16.35%
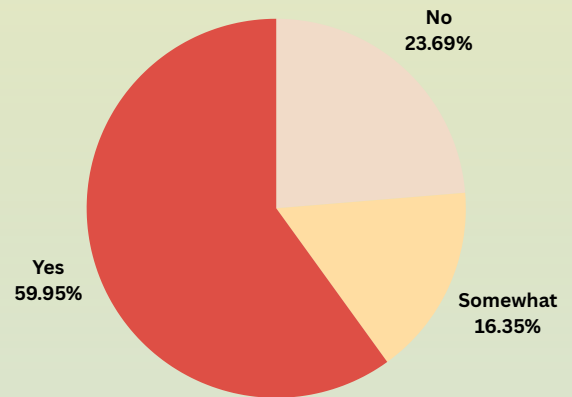
Sleep time

79.5% of the respondents get a moderate (5-7hrs) amount of sleep in a day, while
10.3% reported that they are barely getting any sleep (only 2-4hours) each day.

5-7 hours of Sleep

PROFILE OF A TYPICAL APP-BASED DRIVER

1. Age

Over 78% of the drivers we spoke to belong to the age group of 21-40 years indicating a fairly young pool of respondents with a majority of this segment belonging to the city of Indore. Around 20.5% respondents fell under the age-group of 41-60 years.
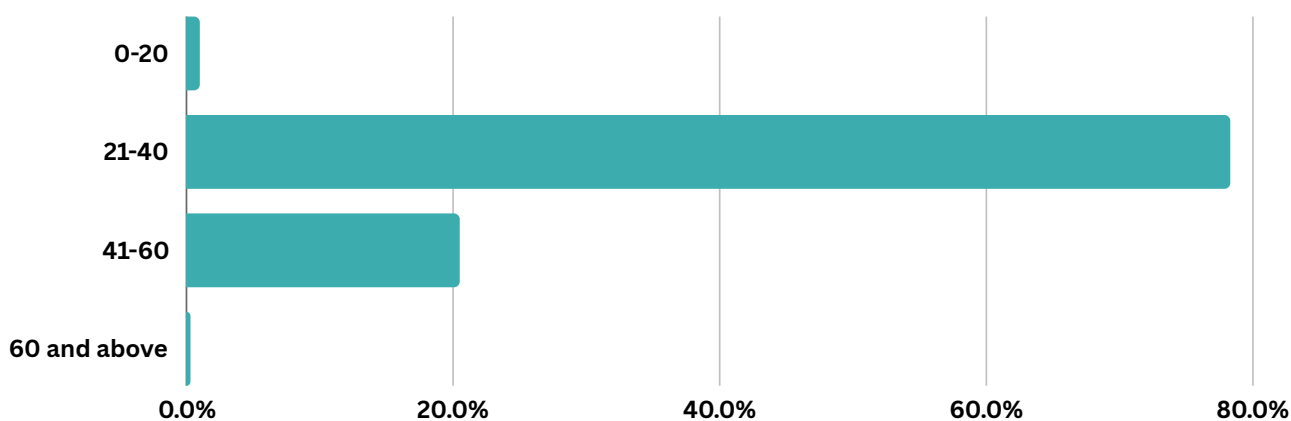
2. Gender

The respondents in this study were predominantly male at 94%. Of the 6% female respondents surveyed, a majority were from Hyderabad at 17%. The non-conducive work and infrastructural barriers for women could explain why this industry is male-dominated.
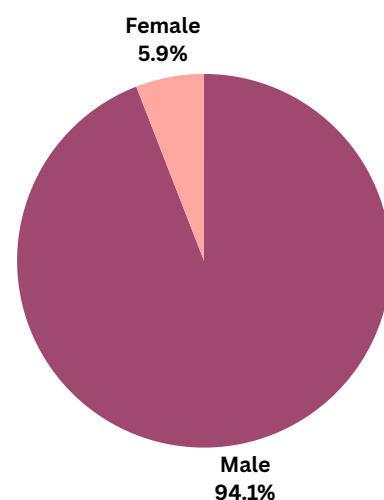
3. Educational Qualifications
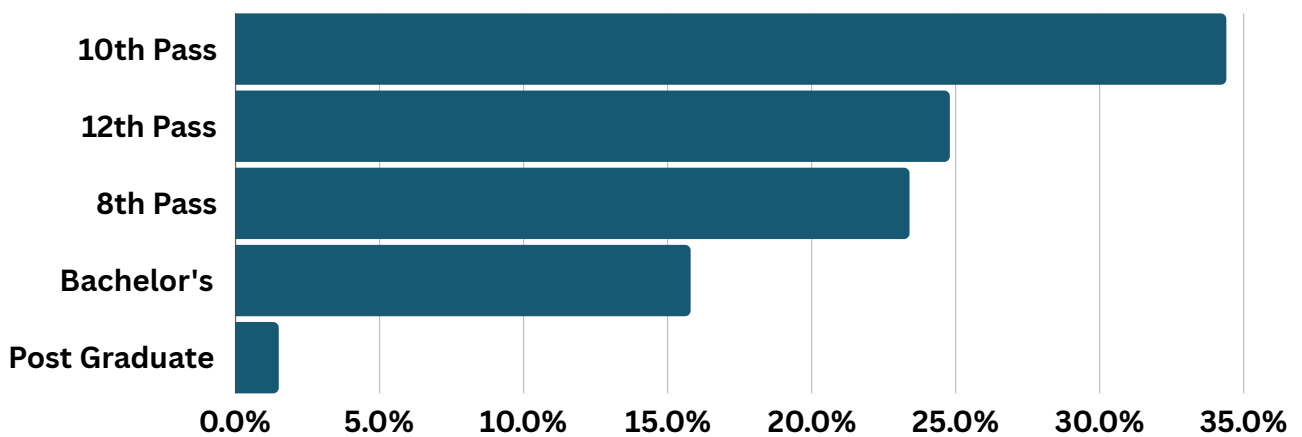
Around 59.3% of our respondents were high school graduates with a majority (34.4%) having passed matriculation. 50% of those who had passed class 10 were from Bangalore. Only 3% of those who passed class 12 were from Bangalore and a majority of them were from Hyderabad (36.5%). Only 1.5% of the drivers were post graduates.

4. Marital Status
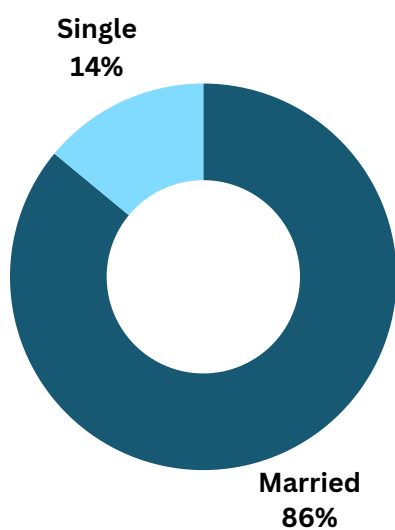
86% of our respondents **were married** and **14%** reported themselves as **unmarried.**

Around **94% of the married respondents were from Bangalore** while the majority of respondents who reported themselves as unmarried (21.7%) were from Delhi.

5. Number of dependents in the family
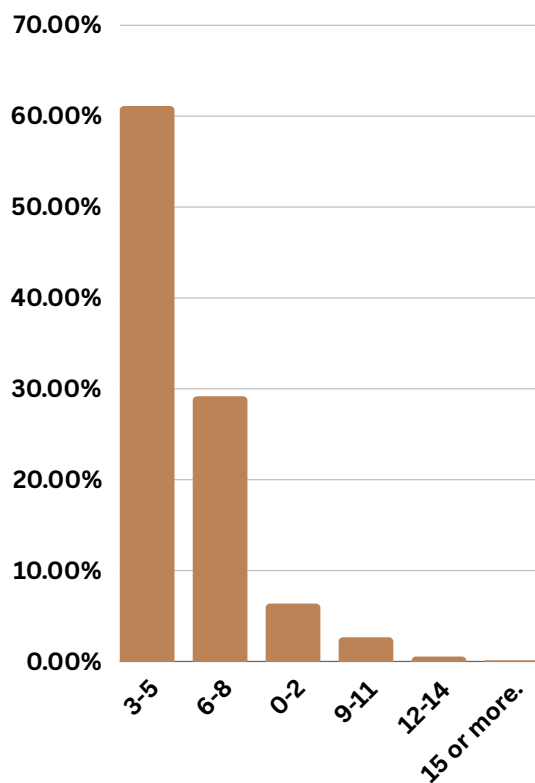
A majority of the respondents (61.1%) reported that they support 3-5 members in their family. Most of the drivers belong to nuclear middle or lower middle class families where they are the only breadwinners. This figure has a bearing on the hours spent working and the drivers' earnings, as we have found further in the study.

65.3% of such drivers belong to the city of Mumbai.

6. Religion

Most of our respondents were Hindus (83.20%) followed by Muslims at 15.45%. Most Muslims belonged to Mumbai (31.08%) while most of the Hindus belonged to Jaipur (93.76%).
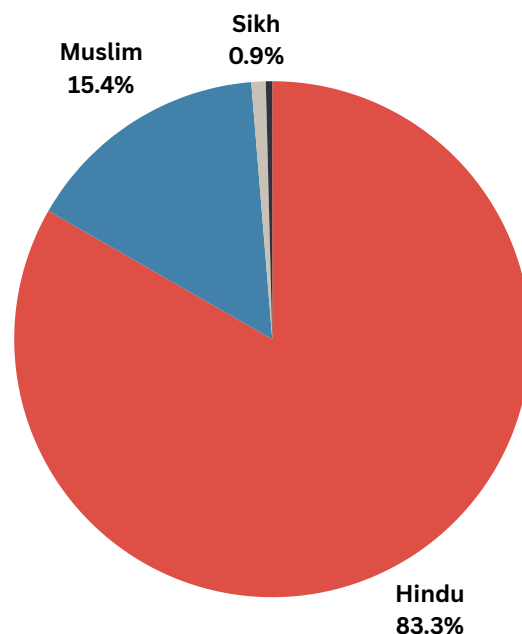
7. Social Category
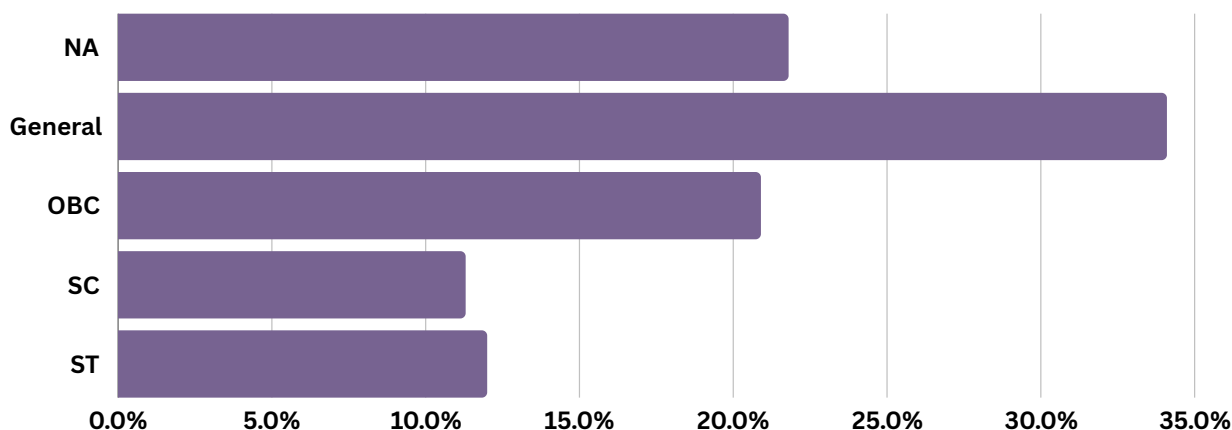
34% of our respondents reportedly belonged to the unreserved category.

20.9% of the respondents belonged to the Other Backward Classes. Of these, a majority belonged to the city of Indore (50.5%). 11.3% of the respondents belonged to the Scheduled Castes, while 12% belonged to the Scheduled Tribes. These figures are closely proportionate to the national figures, indicating that the data is representative. 21.8% of the respondents were not comfortable sharing their details with us. Most of such people belonged to Hyderabad (46.3%).

8. Company Profile

A majority of the respondents reported that they worked for both Ola and Uber (49.6%). 76.8% of such drivers belonged to Kolkata followed by Mumbai (75.4%). 19.3% of the drivers exclusively worked for Ola while 17.9% worked for Uber. Over 11% of the respondents claimed to be working for up to 3 cab hailing platforms.
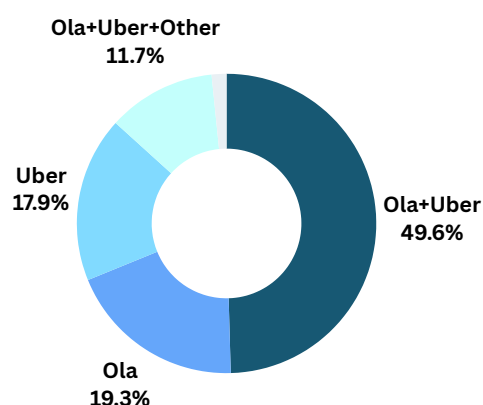
9. Years spent working for the company

59.3% of the respondents have been working for the app- based companies for 3-5 years. Of these, 71.9% belonged to Bangalore. Close to 21% of the total respondents have been working for these companies for 5-7 years.

6.2% of the respondents reported to have been working for these companies for more than 7 years.
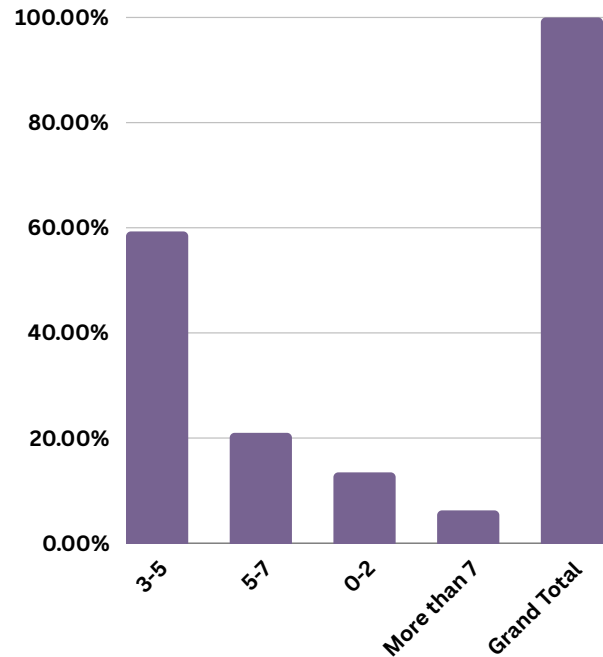
10. Past Employment Record

Private job	30.55%
Driver	29.01%
Unemployed	24.39%
Studies	9.13%
Self employed / Business	4.21%
Agriculture	1.66%
Labor	1.06%
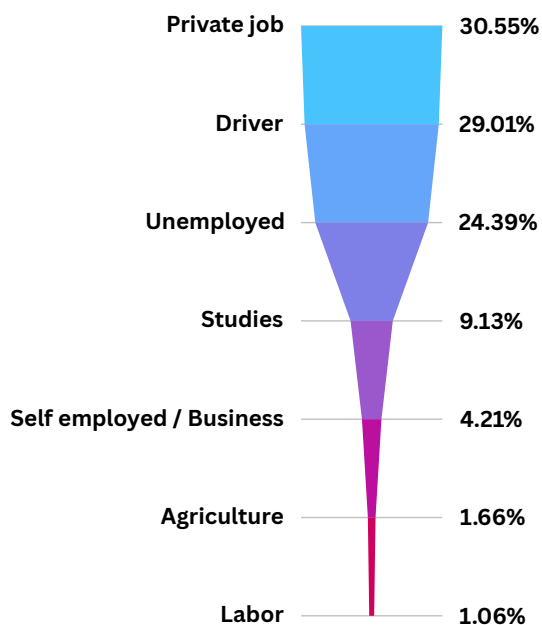
30.5% of the respondents held private jobs before becoming drivers for the app-based cab companies. 29% of the respondents were drivers before joining the cab companies. 24.3% of cab drivers were unemployed prior to working for the companies. Of these, 76% belonged to Bangalore.

11. Type of vehicle used for driving
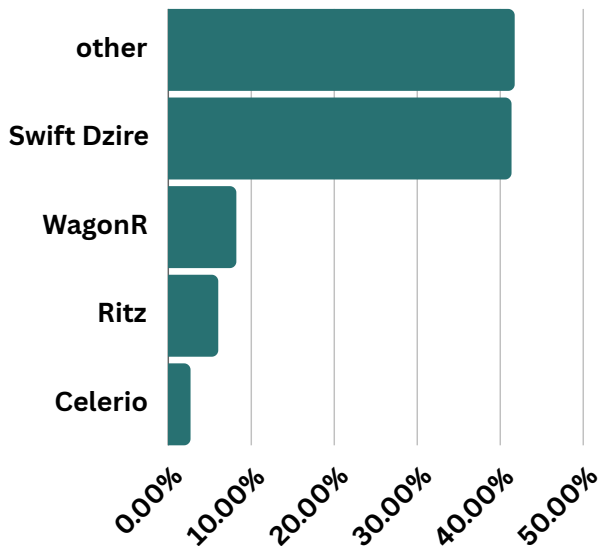
41.4% of the respondents drove Swift Dzire. Of these, a majority (71.3%) belonged to Hyderabad. The type of vehicle in this work has a bearing on the ride fares, as bigger cars can be driven under superior category rides.

12. Nature of Ownership of Vehicle
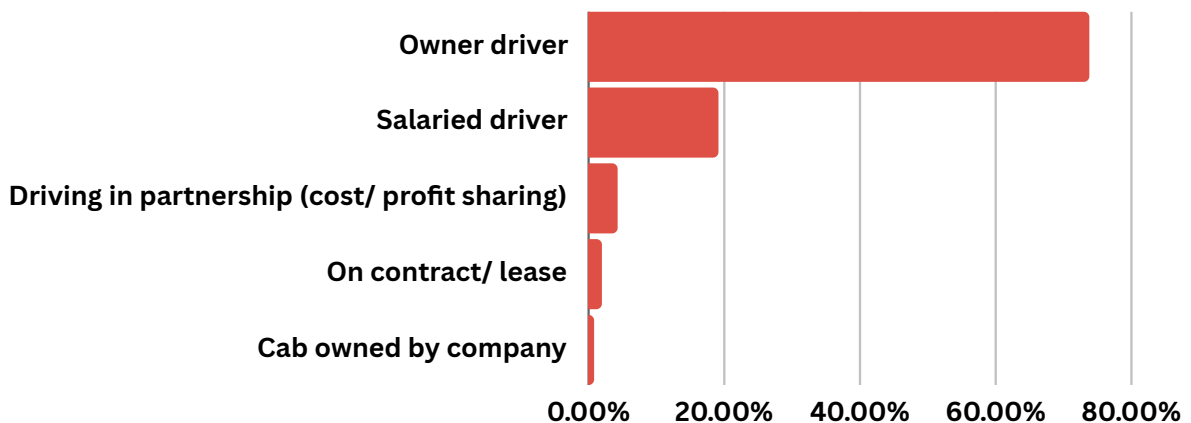
According to the data, 73.8% were owner-drivers. The cars they drove were owned by them, and they had either already paid the EMIs or were still paying them. 99% of such drivers belonged to Indore.

Next, at almost 19%, came salaried drivers. 53.5% of the salaried drivers belonged to Bangalore. 4.3% drivers reported that they owned the vehicle in partnership with someone else, while 2% reported to have obtained their vehicles on lease.

13. Full Time or Part Time
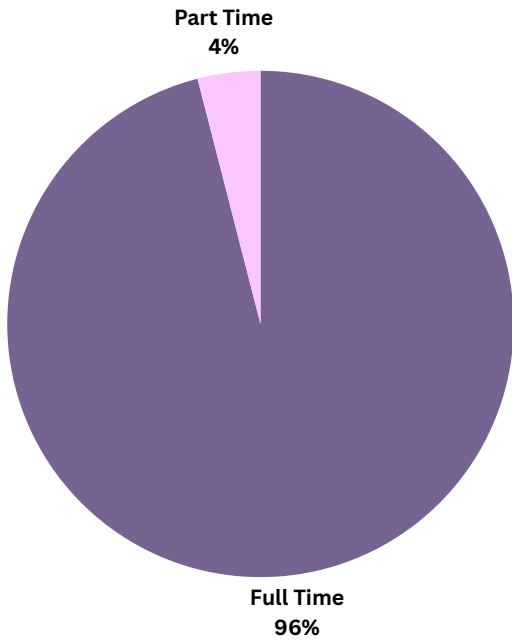
Only 4% of the respondents reported that they were working part time. Rest all (96%) were working full time as app-based cab drivers. Most of the part timers belonged to Delhi (9.3%).

Part Time 4%

Full Time 96%

14. Are the drivers a part of any union?

Almost 36.6% of the drivers reportedly belonged to some union, while 63.4% of them revealed that they were not part of any union.

No

Yes

0.00% 10.00% 20.00% 30.00% 40.00% 50.00% 60.00% 70.00%
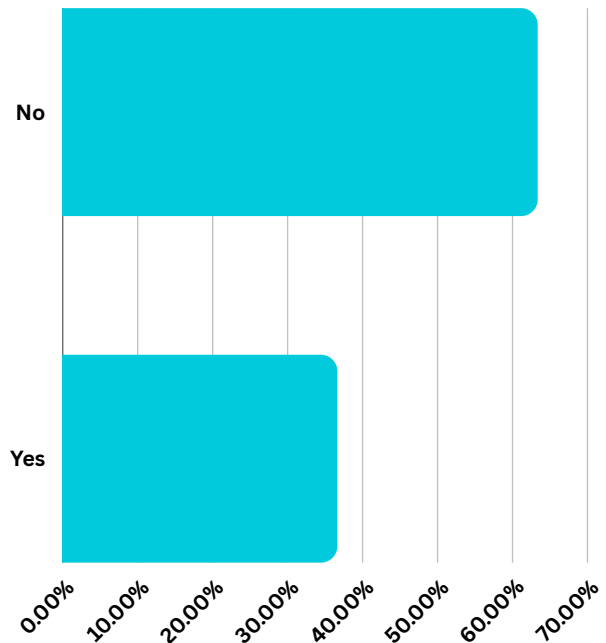
WORKING CONDITIONS OF THE DRIVERS

1. Hours Spent Driving
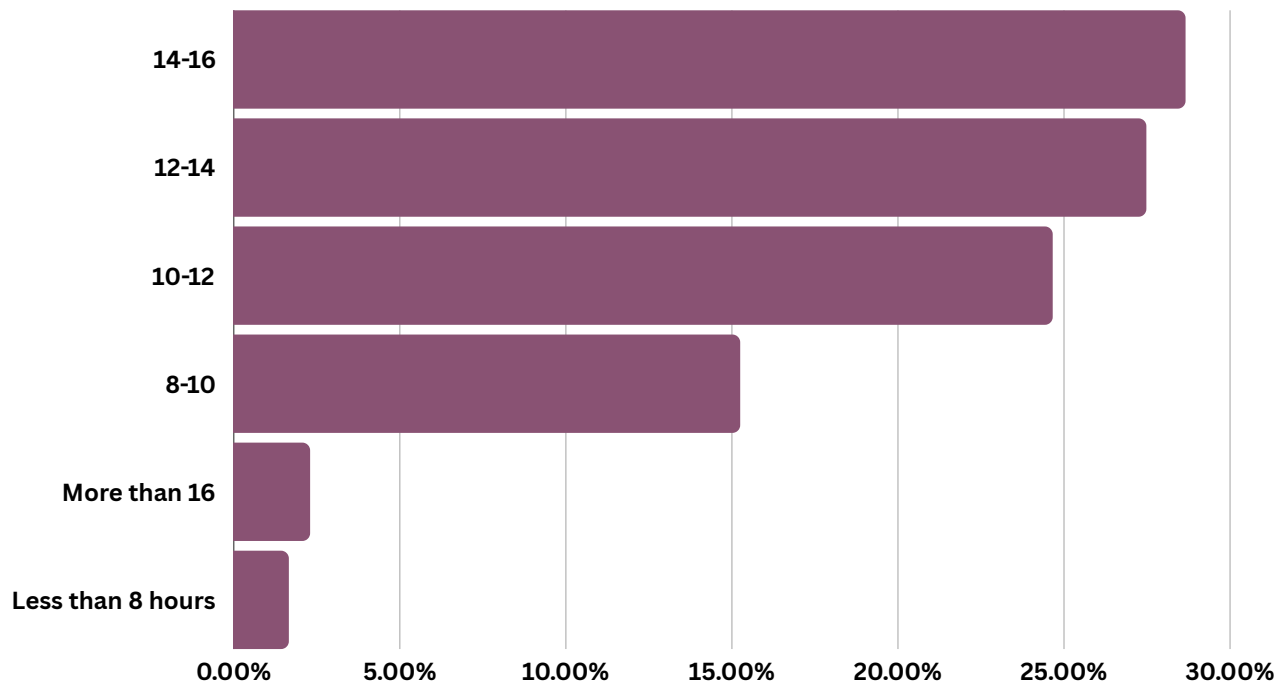
A number of glaring facts were revealed in this finding.

Over 83% drivers work for over 10 hours a day, close to 60% work for over 12 hours a day, and a glaring 31% drivers work for over 14 hours a day.

Almost one fourth of the drivers work between 14-16 hours a day. A close second was 27.5%, who work between 12-14 hours a day.

81% drivers in Bangalore reportedly drive between 14 to 16 hours a day. Heavy demand, more number of rides (as shown in the next figure) and long distances from the airport could be some of the possible explanations of this.

2. Number of Rides per Day
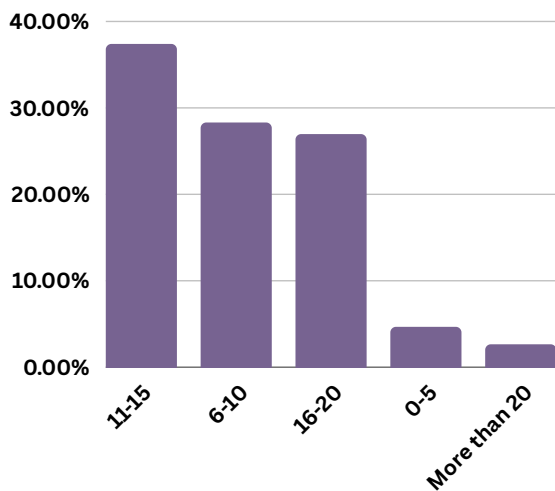
A majority (37.4%) of the respondents pick up 11-15 rides per day. 71.2% of such respondents belong to Jaipur.

27% pick up 16-20 rides per day. A majority (79.5%) of them belong to Bangalore.

3. Kilometers Travelled per Day

A majority (36.8%) travel 150-200 kilometers in a day for work. Of these, 47.9% belonged to Bangalore.

28.5% of the respondents reported that they travel 200-250 km in a day. Of these, a majority (51.2%) belonged to Mumbai.

4. Average Sleep Time

Adequate (8 hrs or more)
8.8%

Barely (2-4 hrs))
11.7%

Moderate (5-7 hrs)
79.4%
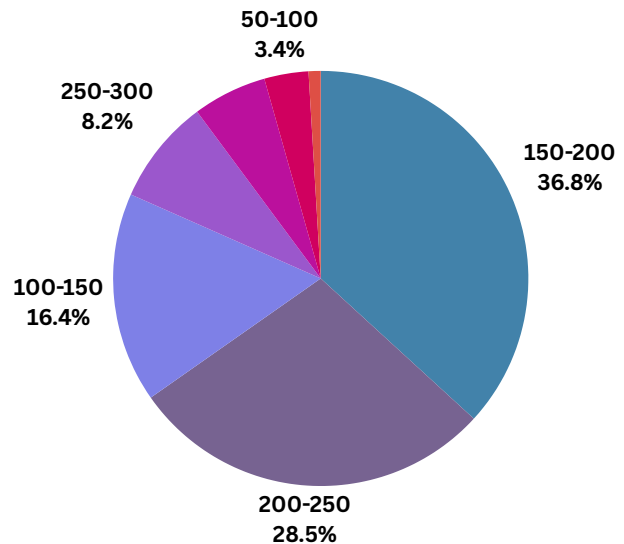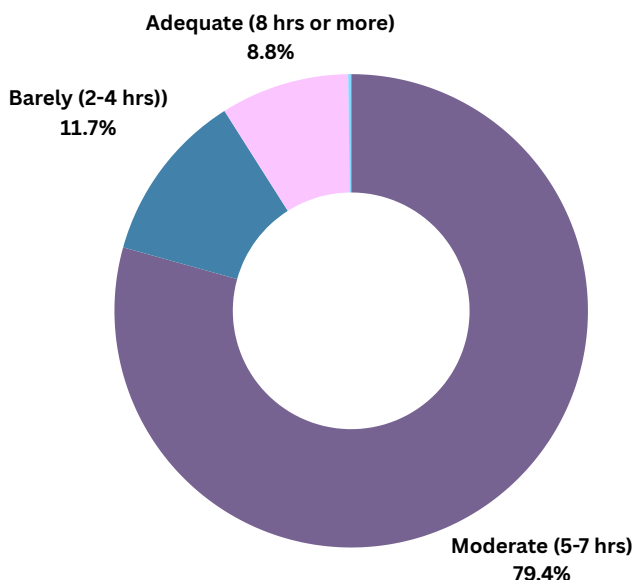
According to the data collected, 79.4% of the respondents are able to get a moderate amount of sleep each day (5-7 hours).

Almost 12% respondents reported that they barely got sleep (2 to 4 hours).

Only 8.8% of the respondents were able to get an adequate amount of sleep in a day (8 hours and above).

5. Weekly Offs

40.7% of respondents said they take no leave from work in a week. Of these 72.6% belong to Bangalore. Bangalore has a high demand for rides, which may explain this.

33.3% reported that they take at least one day's leave during the week. Almost 50% of such respondents belong to Delhi.
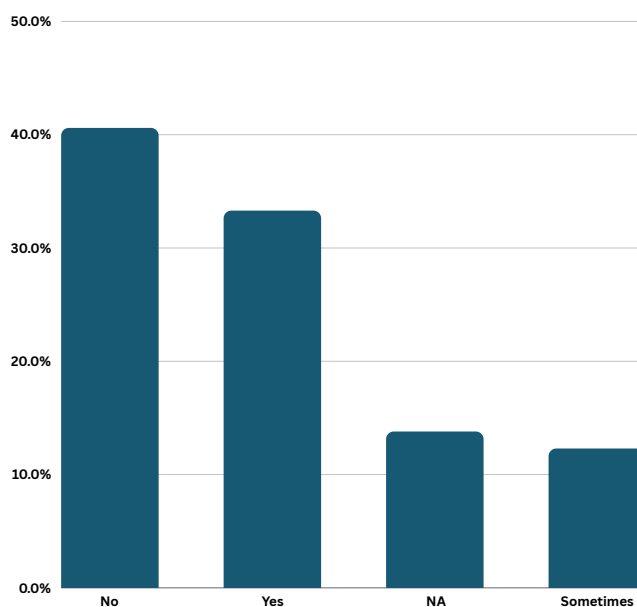
6. Monthly Offs
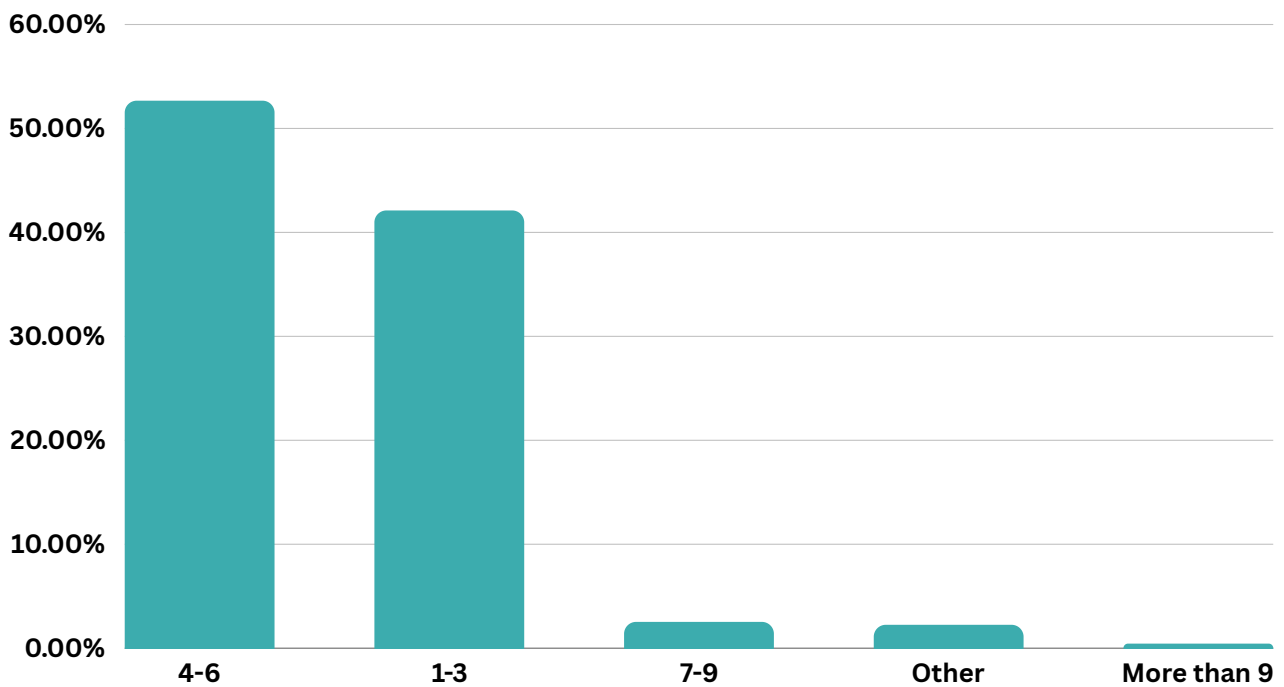
52.7% of the respondents take 4-6 days off from work in a month, while no regular weekly offs were reported. This could imply that many drivers take consecutive offs to visit their hometown.

Around 42.1% respondents reported that they take only 1- 3 offs in a month, which proves the earlier result that majority are not able to take even 1 day off every week. Bangalore again has the maximum proportion of such drivers (close to 90%) who are able to take only 1-3 days off in the entire month. In Indore 100% respondents, in Jaipur 98% and in Lucknow around 94% drivers reported that they take 4-6 offs in a week).

This clearly show that respondents in the smaller cities are able to take a greater number of days off from work as compared to those in the bigger cities.

7. Vacation Time Off

45.8% of the respondents reported that they were not able to take any vacation or long period off from work. 80% of such respondents belong to Bangalore.

Sometimes
24.3%

No
45.8%

Yes
29.8%
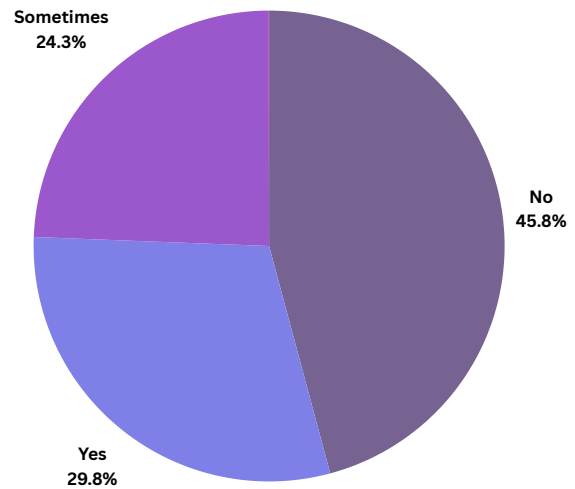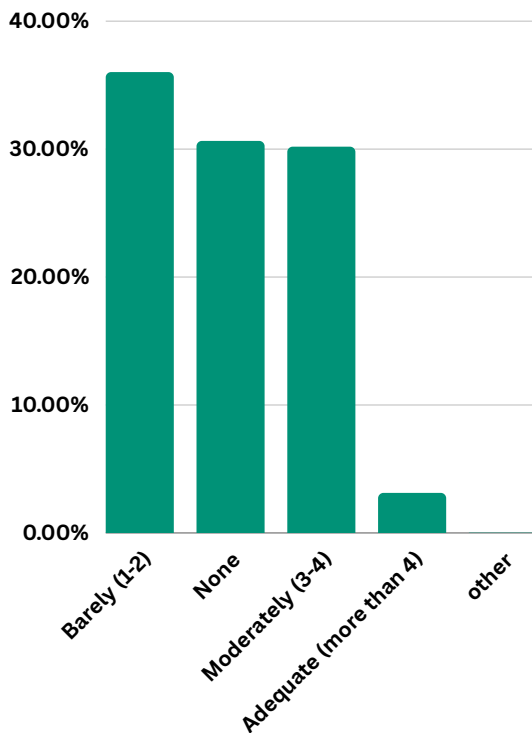
8. Quality Time

36% of the respondents said that they barely get any leisure/quality time with their families (1-2 hours).

Furthermore, 30.7% reported that they could spend no leisure time or quality time with their families.

It was disheartening to find that a majority of respondents (66.6%) had little to no leisure/quality time to spend with their families. The question on leisure time entailed something as basic as spending time with one's children which appears to have become a matter of privilege for the cab drivers.

9. Effect of customer behavior on Driver
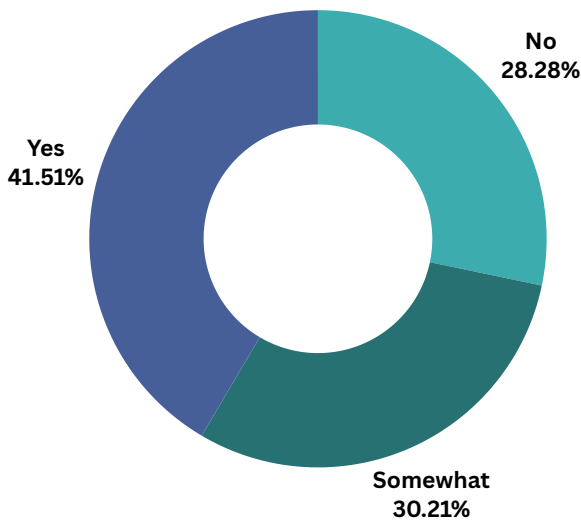
Yes
41.51%

No
28.28%

Somewhat
30.21%

Around 72% of the respondents reported that the issue of customer behaviour affects them in some way or another. Among these, 42% reported that it affects them considerably.

10. Physical Health Issues
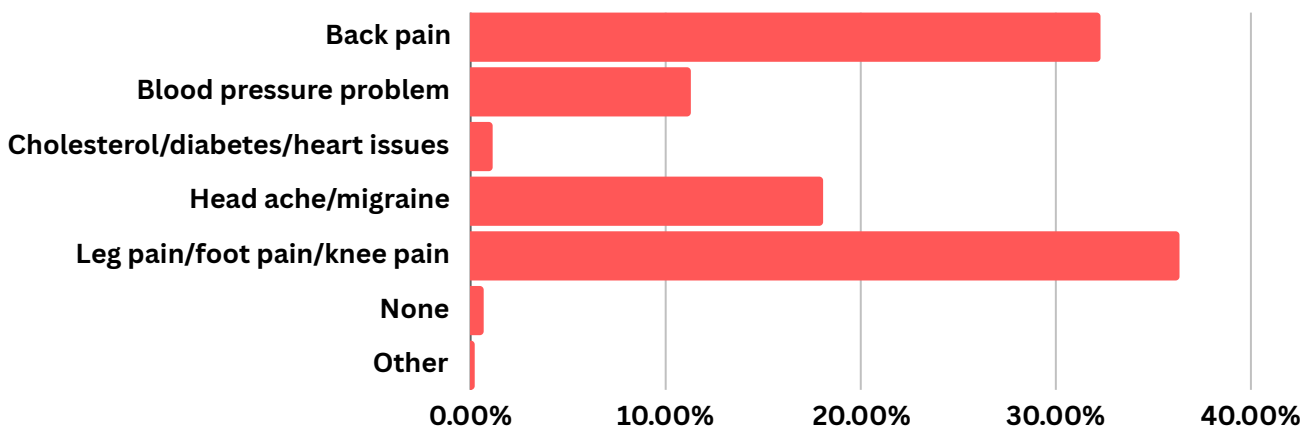
Only 0.7% of the respondents faced no physical health issues because of their work. Of the rest, 36% faced leg/foot/knee pain, while 32% reported back pain and related ailments. 1% of the respondents also reported facing serious heart/cholesterol issues.

11. Mental Health Issues
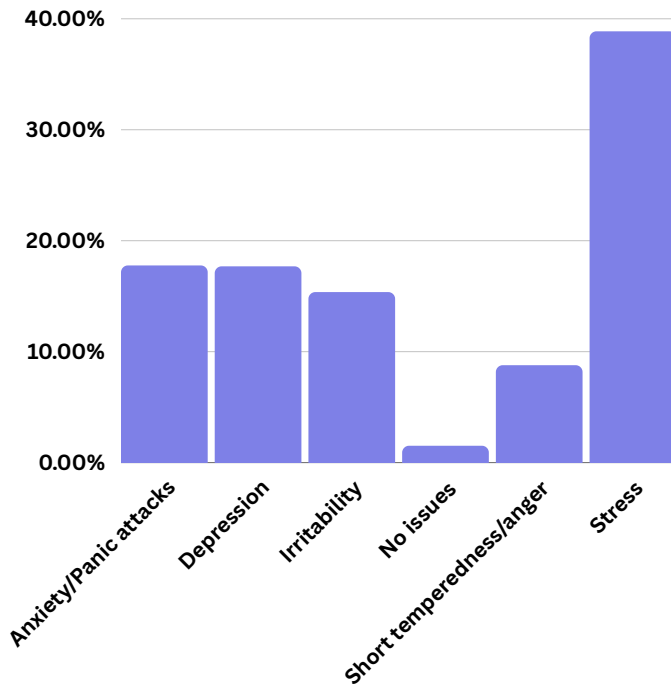
Only 1.5% of the respondents reported facing no mental health issues due to their work. This indicates how mentally draining and precarious the work is. Around 51% experienced some form of anxiety, depression or irritability due their work. Additional 39% of the respondents reported facing stress.

12. Issue of ID Blocking and Deactivation

46.8% of respondents feel extremely affected by ID blocking. 92% of such respondents belong to Indore and almost 83% to Bangalore. A cumulative 64% respondents are affected by the issue of ID blocking considerably and extremely.
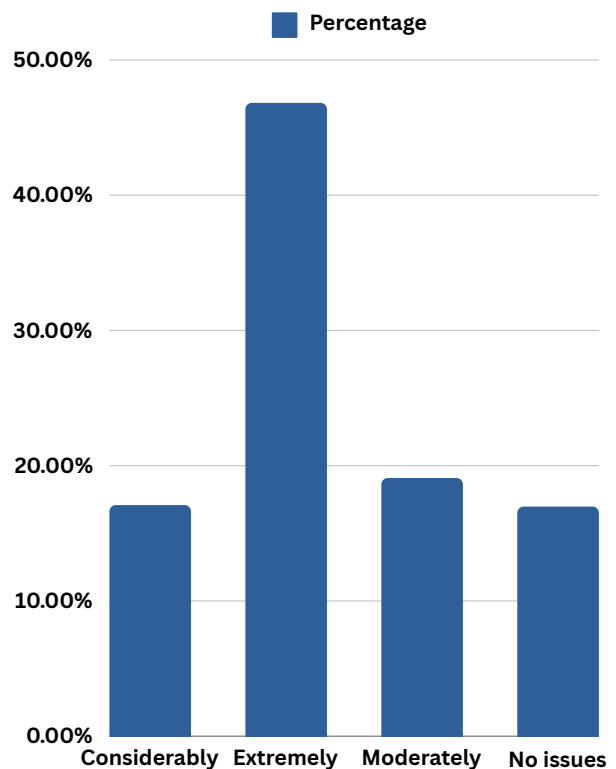
13. Age of drivers and hours driven per day
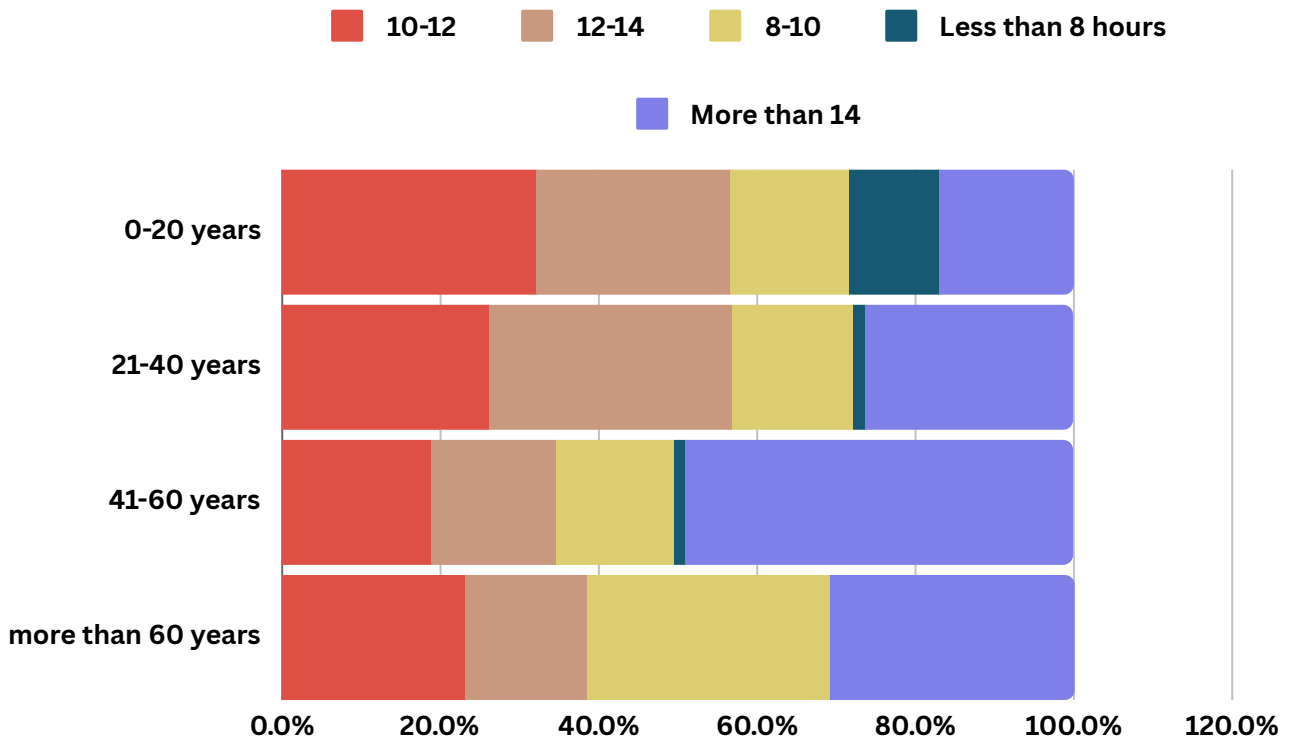
The above figure shows that with an increase in age, the number of working hours tend to increase until a point. Close to 50% respondents in the age group of 41 to 60 years work for over 14 hours a day, while only 26 % of respondents in the age group of 21-40 years work for more than 14 hours in a day.

Even among the elderly drivers over the age of 60, almost 31% drivers tend to drive for more than 14 hours a day, and none drive for less than 8 hours a day.

On the other hand, and contrary to expectation, the least proportion of people working for over 14 hours a day belongs to the youngest age group of zero to 20 years. This shows that with the higher age group categories, the drivers are likely to have greater household responsibilities, expenditure, and number of dependent family members, which forced them to overwork, sometimes in sub-human conditions.

Overall, less than 2% of the drivers drive up to 8 hours a day or over 98% work for over 8 hours. This shows that the norm of an 8-hour work day which was achieved by labour unions and workers through a collective struggle over many years, is being systematically dismantled.

14. Social category and working hours
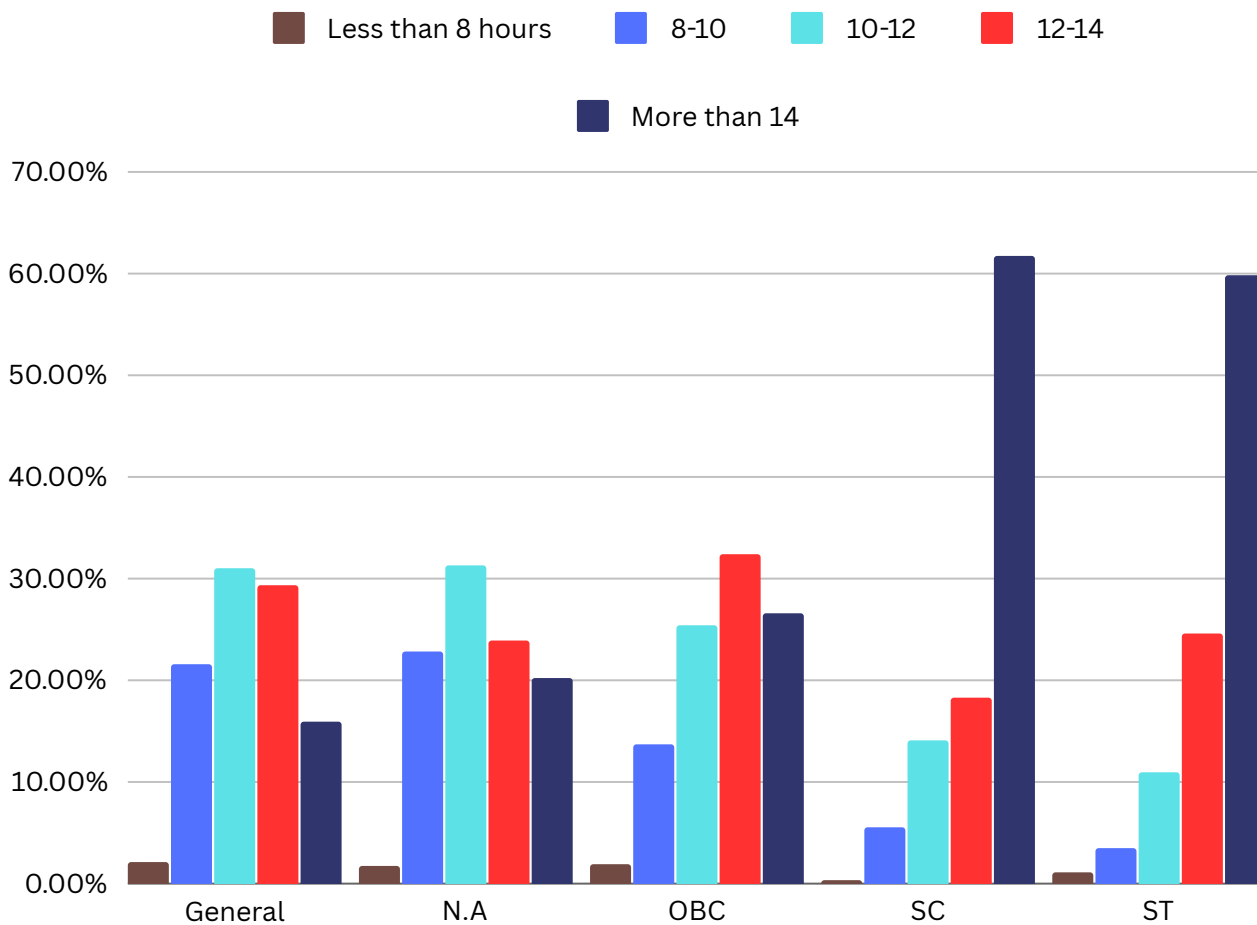
The above figure shows that about 61.7% SCs and 60% STs work for over 14 hours in a day. On the contrary, 16% drivers from the general category and 26.6% OBCs work for such high number of hours. This clearly shows that respondents belonging to SC or ST background might have much higher burdens and responsibilities or debts to pay off, because of which they need to overwork. If we take overtime as a proxy for self-exploitation, the marginalized castes - SCs and STs seem to the most exploited category in this regard.

15. Social category and migrant status
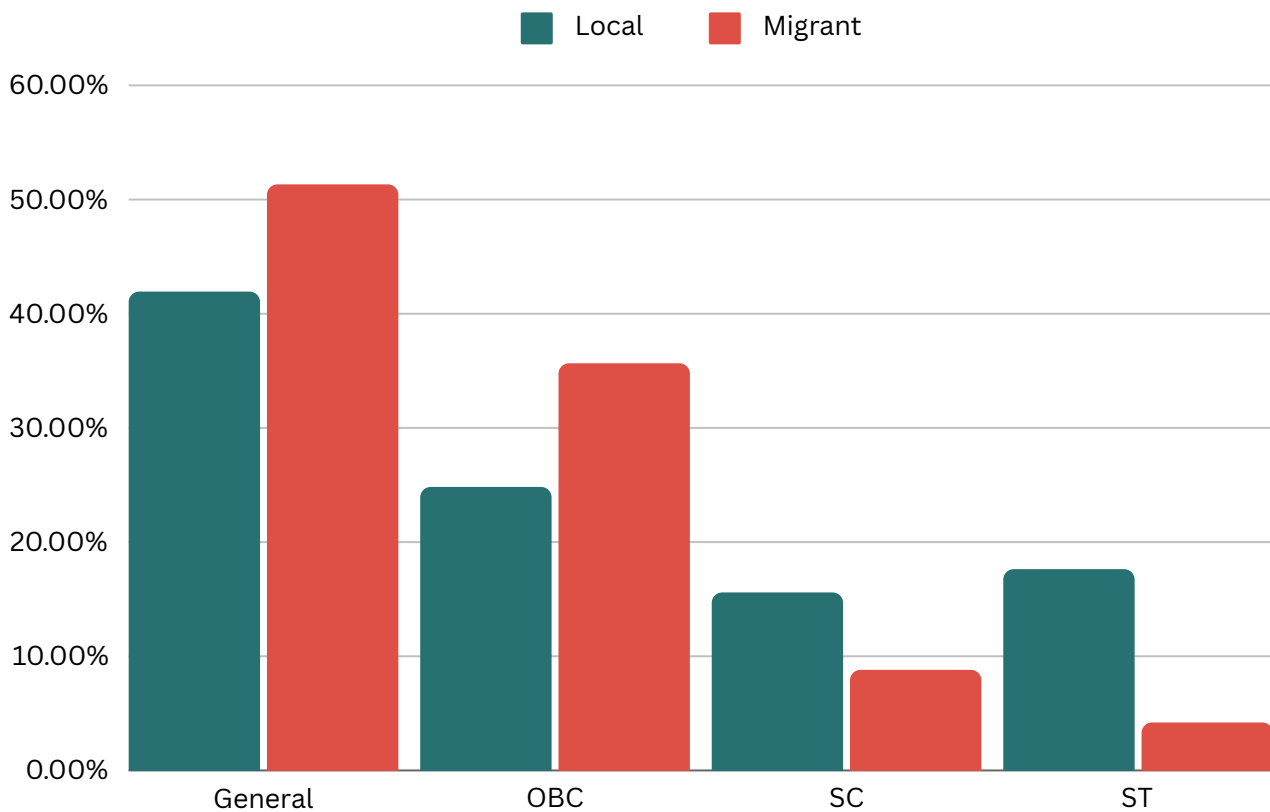
The above figure shows that most Migrant cab drivers hail from unreserved category (51.3) and OBC backgrounds (35.7%), as compared to SC (8.8%) and ST (4.2%) migrant drivers who are less in number. This indicates that as far as the category of caste is concerned, communities with relatively more privilege are engaged in the occupation of app-based cab driving as against those with minimal social, economic, or networking capital at their disposal. The marginalized caste groups migrate to the cities in huge numbers, but it seems they become part of the traditional informal workforce, that includes construction, and other casual daily wage work rather than cab driving.

AVERAGE EARNINGS OF AN APP-BASED DRIVER

1. Daily Fuel Expenses
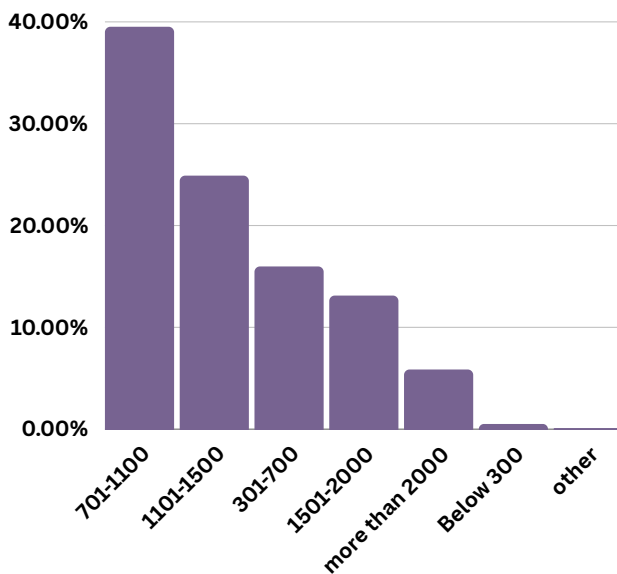
39.5% of the respondents spend between
701-1101 INR on fuel daily. Out of these, the majority belong to Bangalore.

2. Daily Food Expenses

On an average, 42% of the respondents spend around 101-200 INR on food, tea, snacks and tobacco daily. Out of these, a majority (89%) belong to Bangalore.
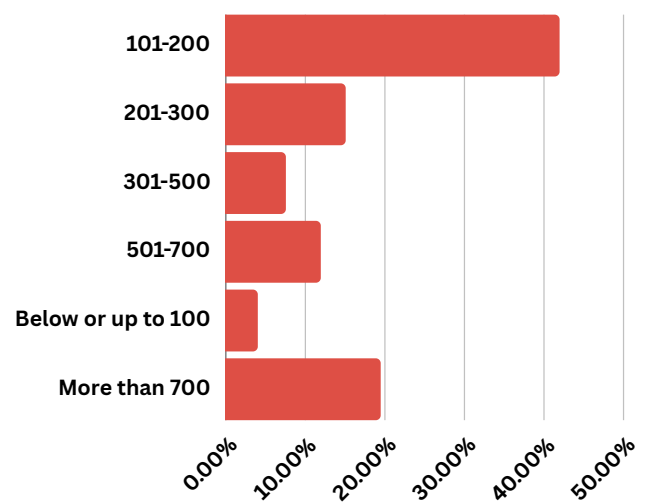
3. Net earnings in a day through the app work
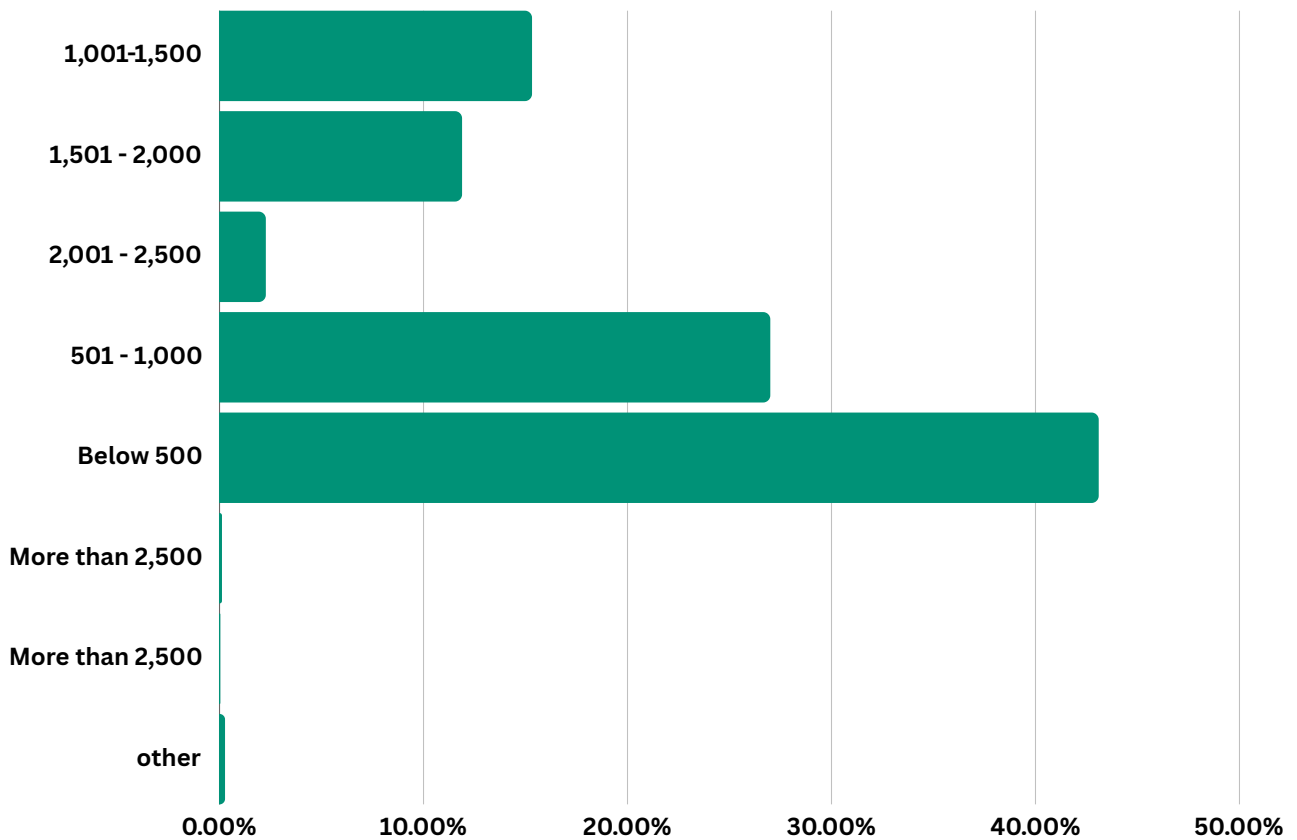
It is quite disheartening to find that 43.10% of the respondents earn below 500 INR a day after deducting all costs (food, fuel, etc). Among these, all of Indore respondents reported income below 500 INR, 99.4% respondents in Jaipur and 98.6% respondents in Lucknow reported a daily income below 500 INR. This clearly shows a pattern of low earnings in small cities.

27% earn around 500-1000 INR in a day. Of these, 87.6% belong to Bangalore.

Only 2.3% of the respondents earn more than 2000 INR per day. 6% of such respondents belong to Hyderabad.

4. Monthly Household Expenses
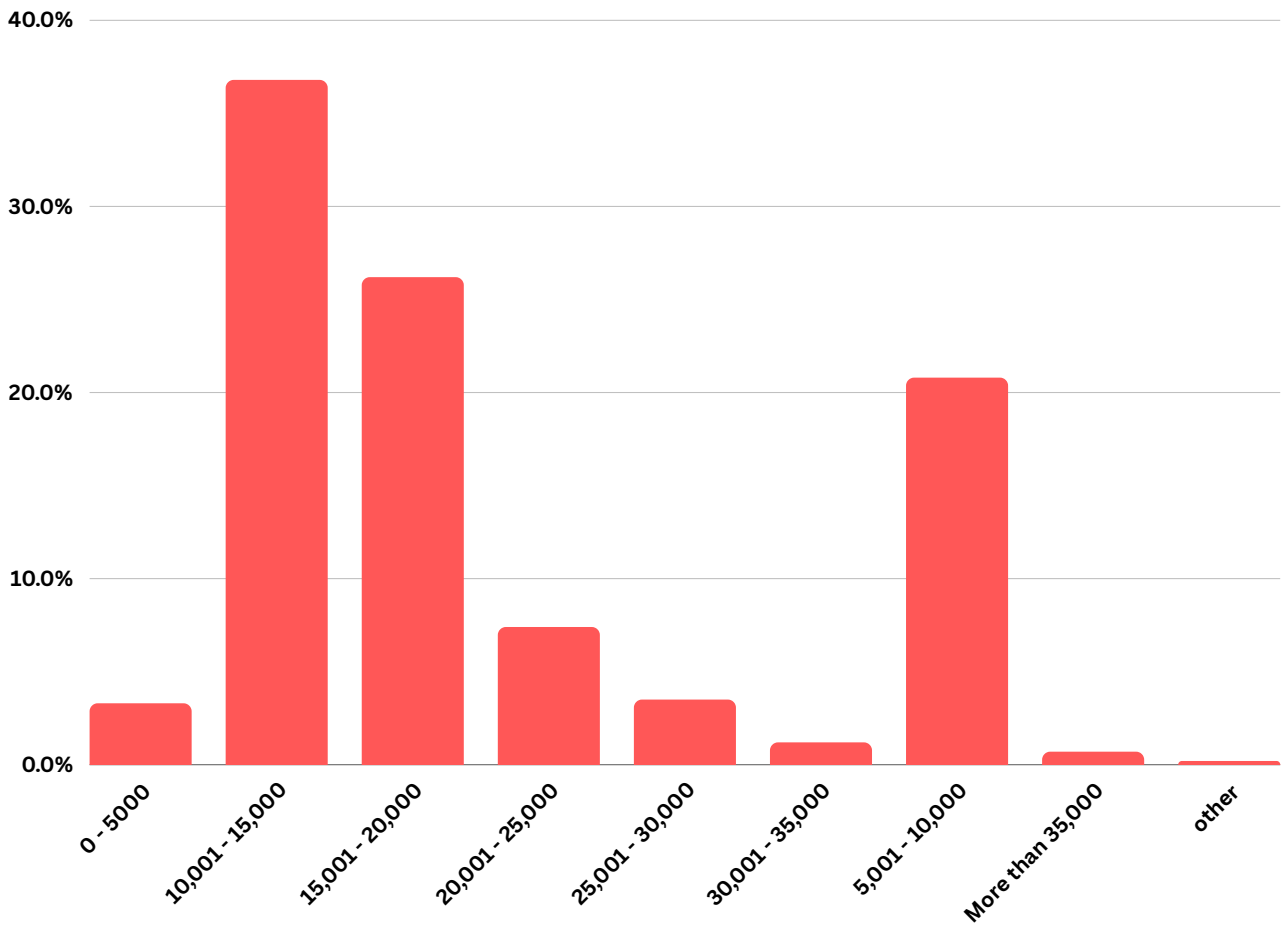
Almost 40% of the respondents spend only upto 15000 INR per month while 66% spend upto 20,000 INR per month. 36.8% of the respondents reported that their household expenditure was between 10,000-15,000 INR per month. Of these, 85.8% belong to Bangalore.

68% respondents even reported that their overall expenses exceeded their earnings. This shows that majority of the cab drivers are in debt-like conditions.

5. Difficulty in managing expenses
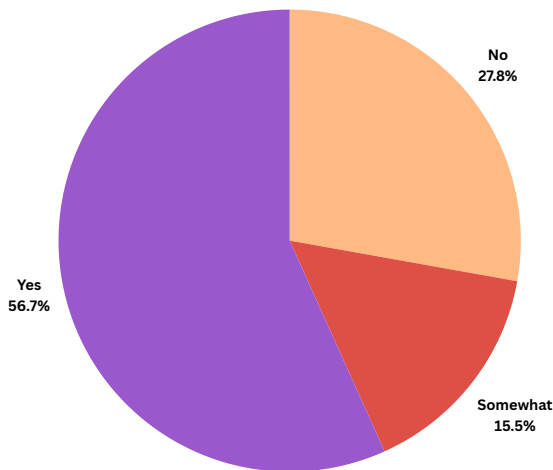
72.2% of the respondents reported that they are either somewhat finding it difficult to bear the household expenses or with certainty that they are not able to meet their expenses with their current levels of earning through app-based cab driving. 56.7% responded in the affirmative when asked if managing their expenses is a problem.

89% of such respondents belong to Kolkata. But a similar trend is found in all cities.

6. Satisfaction with the current fare being offered by the company

A vast majority (80.3%) of the respondents are not satisfied with what they are being offered by the cab companies as the base fare/current fare.

Jaipur has the greatest number of respondents (95.6%) who responded negatively, although the dissatisfaction was being felt in all cities, followed by Bangalore with over 92% respondents showing disaffection with the fares offered.
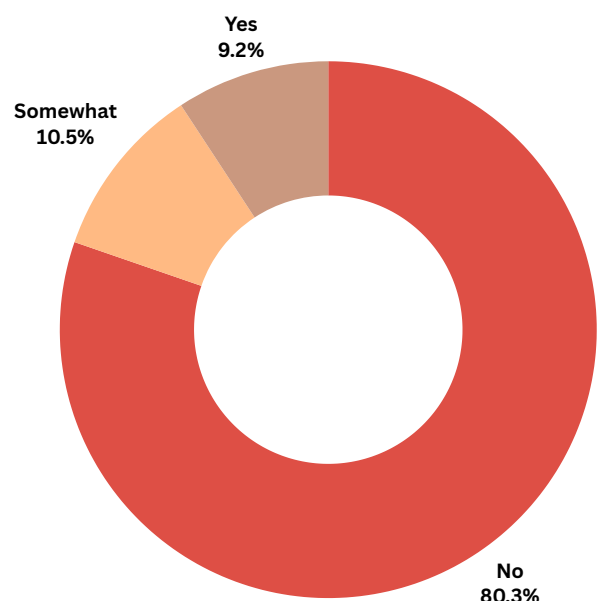
7. Various ways in which cab companies deduct from the drivers' earnings

Unexplained/arbitrary deductions through the app algorithms	29.8%
Arbitrary commission rates	22.5%
Arbitrary deduction on online payments	15.6%
Third party payments/insurance	12.5%
Penalties on low ratings due to driver cancellation or complaints	10.2%
Deduction on taxes	9.3%
No	0.1%
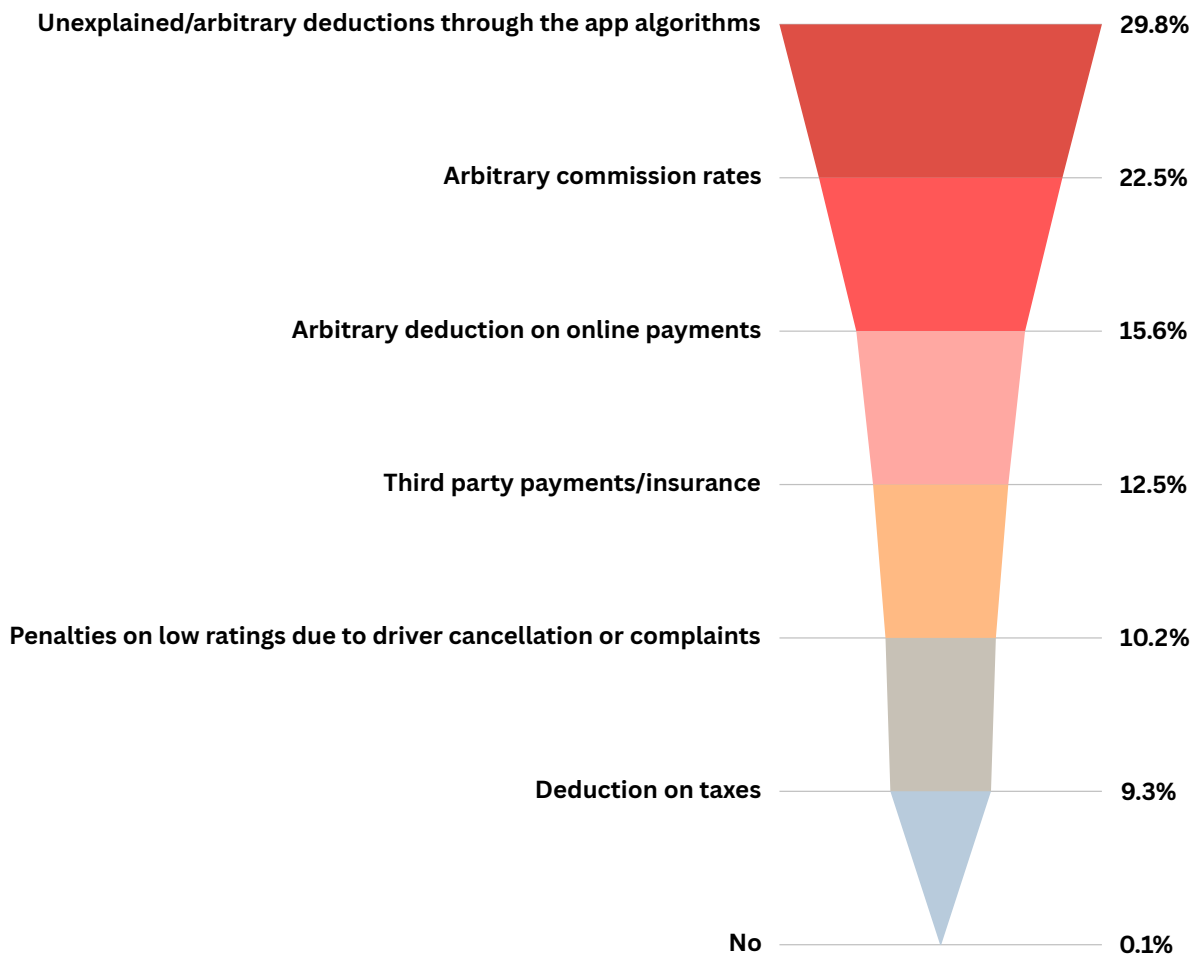
When asked about the ways in which the cab companies tend to deduct from the earnings of the drivers, almost 68% respondents reported that they face either "unexplained" and "arbitrary" deductions due to skewed app algorithms; deductions due to arbitrary commission rates charged by the companies or arbitrary deductions on online payments. These claims call for further investigation which we have attempted in the next part of the report where we examine the screenshots of real-time rides as data points.

8. Commission rate(%) per ride
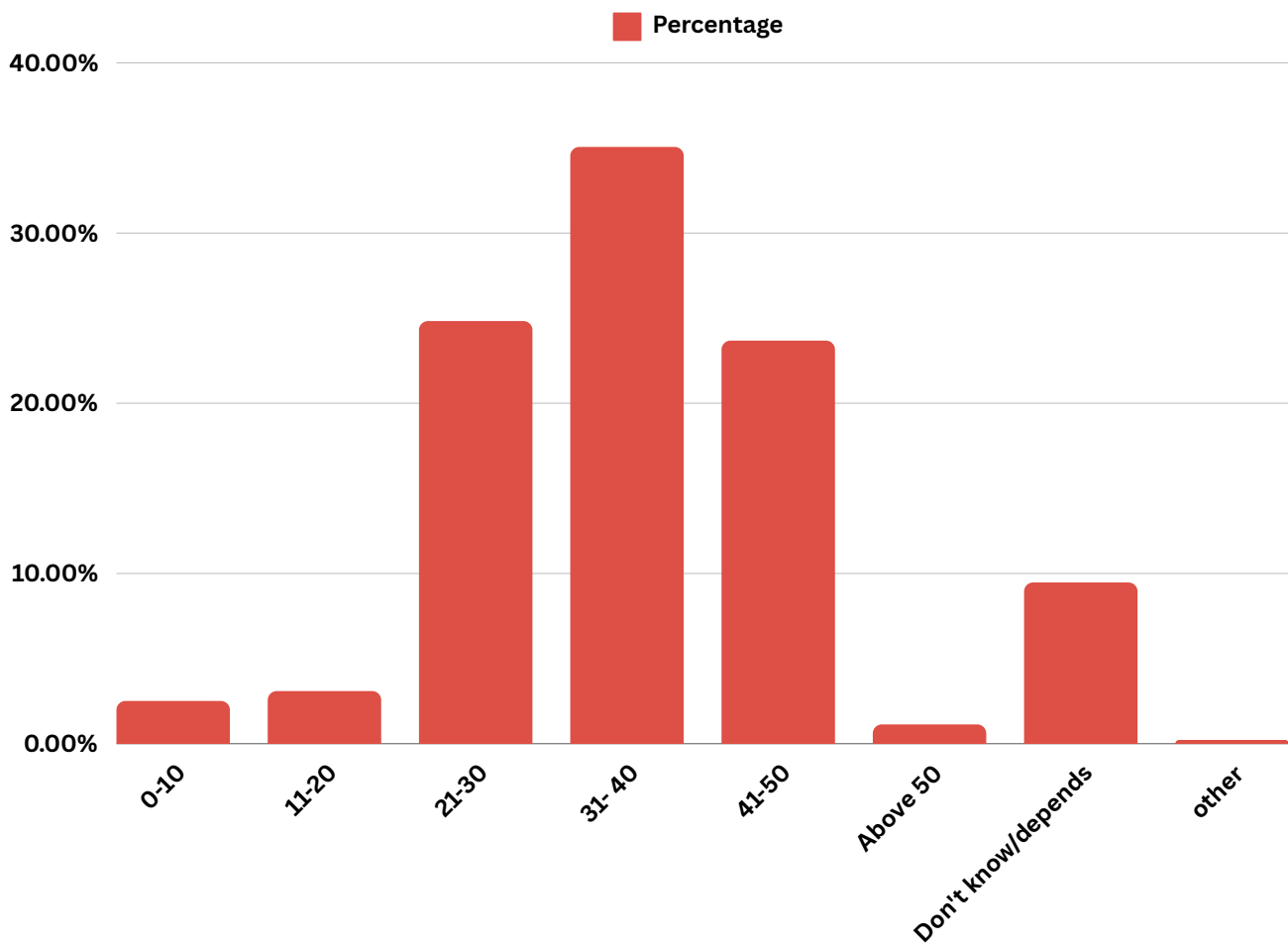
Almost 35% of the respondents believe that the companies are charging 31-40% commission rate per ride. Of these, 93.9% belong to Indore.

23.7% drivers reported the commission rates to be as high as 40-50%, of which, 80% belong to Bangalore. 24.8% reported that the rates are between 20-30%, of which, 50% belong to Mumbai.

9. Additional Compensation
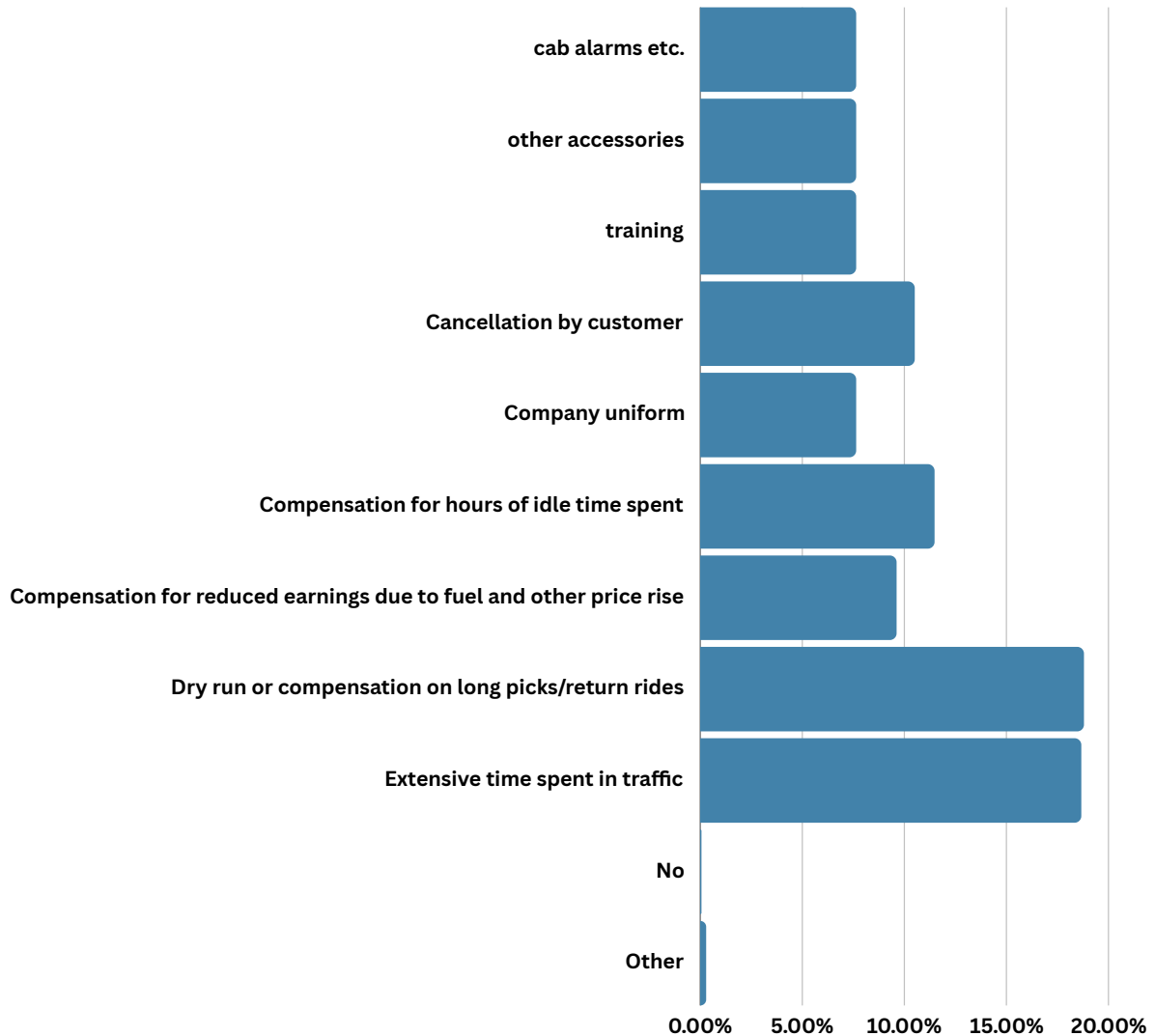
According to the data, 69% respondents felt that the companies should compensate them on one or more of the following:

- dry runs and long pick-ups or return rides
- excessive time spent in traffic
- hours spent on idle time or waiting time for rides
- cancellation by customers
- loss of income due to fuel and other price hikes

Around 31% of the respondents also felt that they should be compensated for the cost incurred on mandatory training, buying uniforms, cab alarms, accessories, etc.

10. Company owned cab and hours driven per day
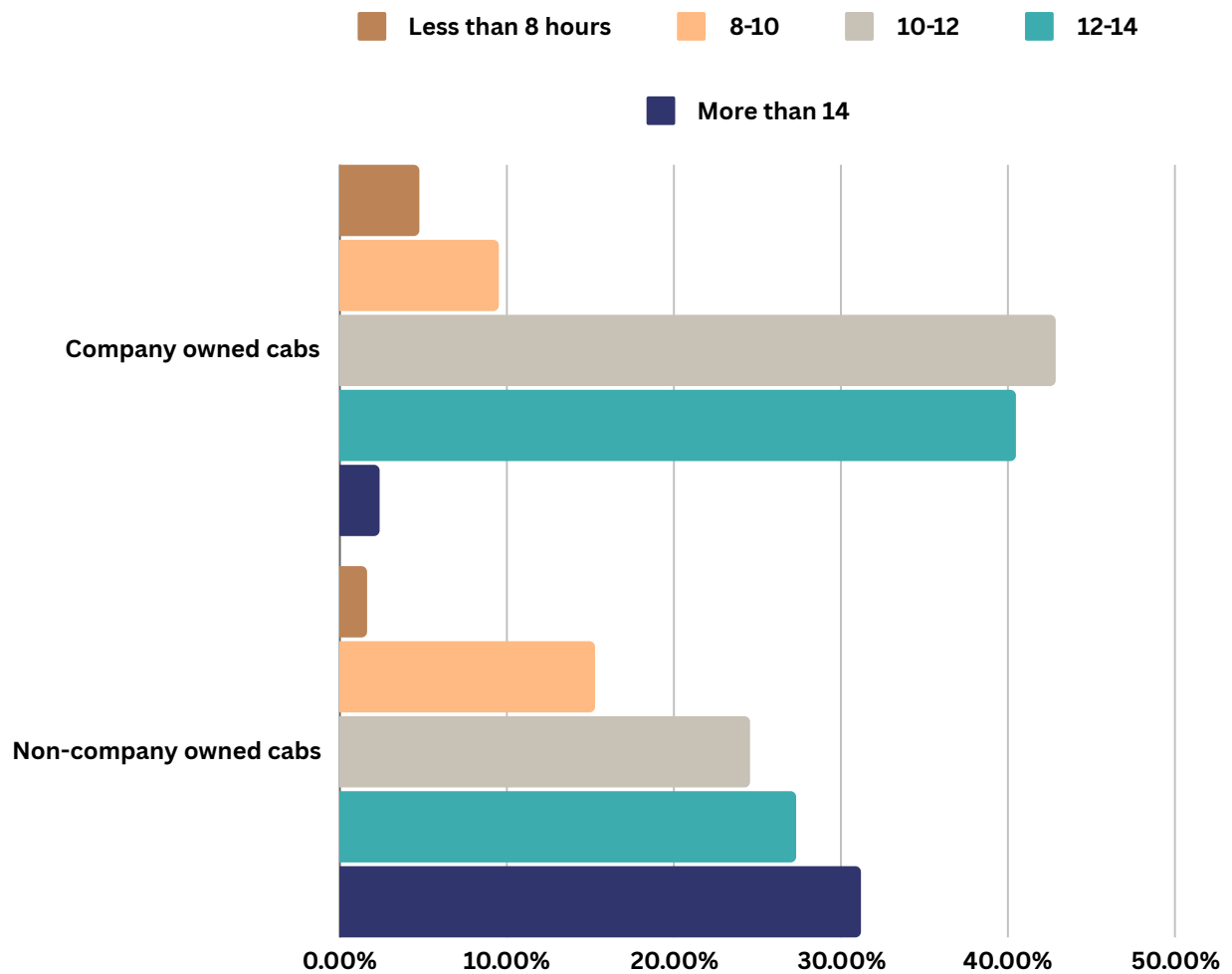
Although company owned cab drivers were a minority of the respondents, we found some glaring differences in these two ownership arrangements (company owned vehicle and non-company owned vehicles), primarily going in favour of the company cabs.

In the above figure, we can clearly see that of the drivers driving the company owned cabs, only 2% of them work for more than 14 hours a day. Of all the other drivers (owners, salaried, partnerships, etc.), 31% of the drivers work for more than 14 hours.

11. Ownership of vehicle and No. of rides per day
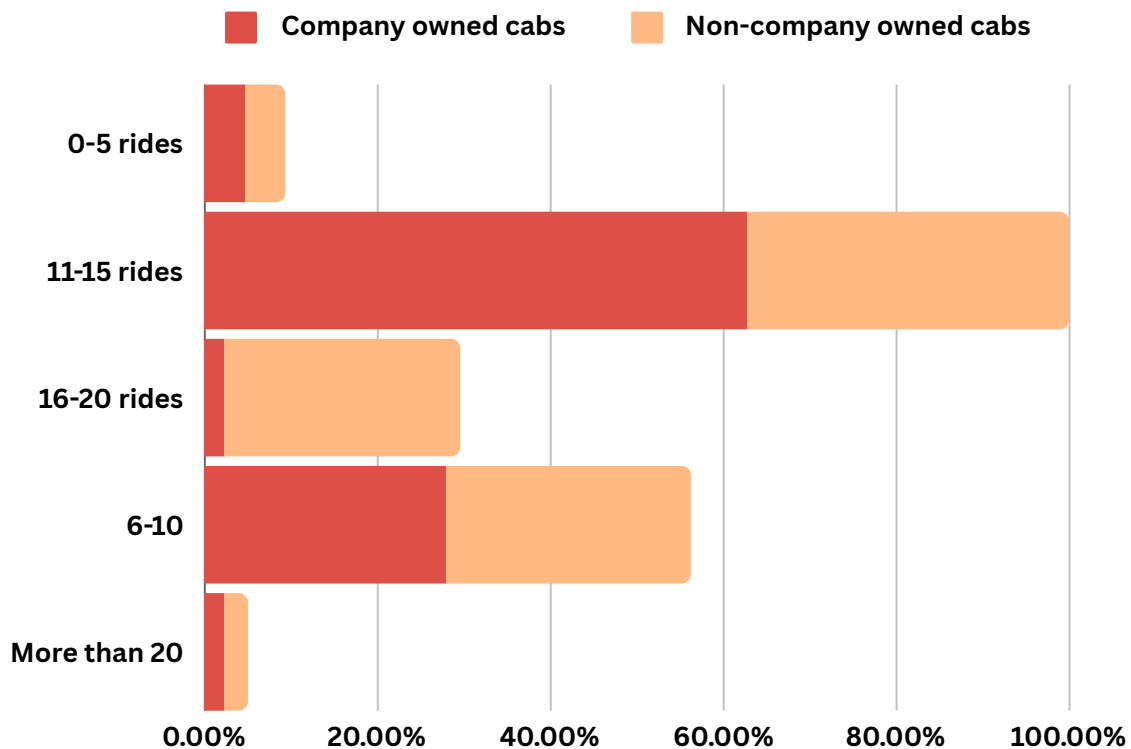
The above figure shows that the drivers driving non-company owned cabs not only work for more number of hours (previous figure), but also get/take more number of rides. 27.2% of them get 16-20 rides in a day while only about 2% drivers driving company owned cabs get 16-20 rides in a day. Most of the company owned cab drivers (63%) get rides in the range of 11-20.

So, despite the data showing trends of over-work among the non-company owned cab drivers, the earnings among the company owned cab drivers is higher than the former (as established in the next figure).

12. Per day earnings of company-owned cabs vs non-company owned cabs
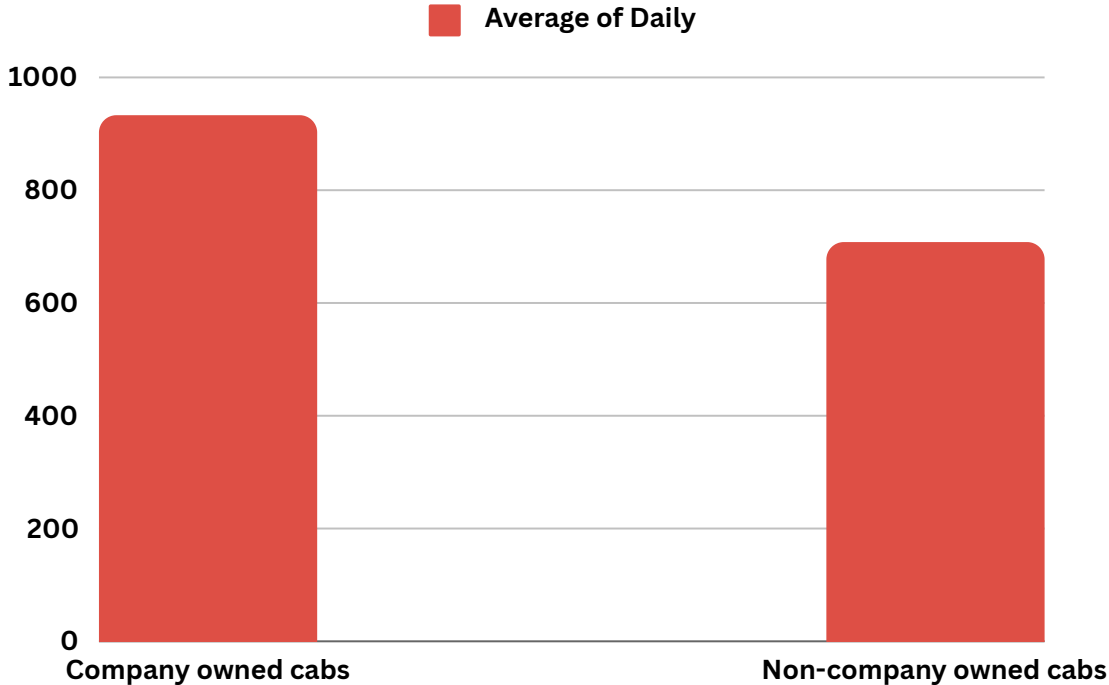
The median monthly earnings of the company owned cab drivers was around 24000 INR, daily earnings were INR 933 while hourly earnings came out to be INR 83. On the other hand, monthly median earnings of drivers driving non-company owned cabs was around INR 18000, daily earnings - 708 INR and hourly earnings came out to be INR 59. Although, the sample of company owned cab drivers was minuscule in this study, the above trends (in figure 2, 3, 4) show wide discrepancies in the findings and warrant for further investigation.

CONCLUSION (CAB DRIVERS)

A rigorous methodology, field-intensive research followed by the analysis of data on socio-economic profiles, working conditions, earnings and other issues collected from app-based cab drivers located in 8 cities of India (Delhi, Lucknow, Indore, Jaipur, Hyderabad, Bangalore, Mumbai and Kolkata) has brought to light some eye-opening and hard-hitting facts about the conditions in which cab drivers operate.

The following are the results and interpretations of the on-ground survey (with 55 questions) :

Age: A majority of 78% of the respondents surveyed belong to the age group of 21-40 years. This testifies that a considerable portion of the young demographic dividend of the country is channelizing their time, energy and skills in the insecure and unrewarding gig and platform industry, and that a considerable portion of the young unemployed workforce of the country is trying to find subsistence through gig and platform work.

Age and hours of work: This study reveals that more the age of the respondents, more is the work that they tend to do. 50% of the respondents in the age-group of 41-60 years are working for over 14 hours, which implies that with age, greater responsibilities, more number of dependents and greater expenses are forcing the workers to overwork at sub-human levels.

Marital status: 86% of the driver respondents were married while 14% of them were unmarried, which shows that most of them had more dependents and greater financial burdens on them, again possibly inducing them to overwork.

Past employment: When enquired about the past employment trajectories of the respondents, 30% of them reported that they switched from private jobs, many of which were reportedly underpaid, 29% of them were previously drivers as well, but

moved to app-based ride hailing platforms as the travel agencies they had been working with, shut down, or their private employers did not pay them adequately. A whopping one fourth of the respondents reported that they were unemployed before they joined the this workforce, while around 9% were studying and came into this industry as they could not find any other suitable job.

Education: While a majority of the driver respondents were high school graduates (10th pass), there were 17% of them with a Bachelors degree, out of whom various drivers were even B.Tech degree holders. This again shows that the respondents could not find a good job opportunity at par with their educational skill sets, and therefore joined the gig and platform workforce out of necessity.

Gender: The survey respondents were predominantly male (96%), which reflects the industry norm of more male to female ratio.

The few female drivers found in the survey were in the profession thanks to some social organisations which were trying to promote women in gig and platform work.

One of the major reasons for lack of women in gig and platform work, especially in cab driving is the extremely inconducive and antagonistic work environment for women, characterised by lack of safety, sanitation facilities, toilets, and prejudices against women drivers.

Social category: 34% of the driver respondents hailed from general category. When probed about it during focused group discussions and other conversations,

it was found that there were no entry barriers for upper castes in the industry. The availability of social capital, networks, easier credit availability, and better educational standards ensured better access and bargaining power for them when compared to a lower caste person when it came to the ability to enter and sustain in the industry.

Social category and migrant status: Most migrants who work in the app-based cab driving sector, belong to General (51.3) and OBC backgrounds (35.7%), while there are less number of SCs (8.8%) and STs (4.2%) who migrate to cities and join this profession. This reiterates the fact that app-based cab driving is an occupation for those who are relatively privileged as compared to those with minimal social, economic, and networking capital. The marginalized caste groups migrate to the cities in huge numbers, but are instead joining the traditional informal workforce, working in construction, rickshaw pulling and other casual daily wage work.

Social category and working hours: The most glaring caste-based inequity found during the course of the study was in the number of hours different caste groups had to work. Drivers from the marginalized castes tend to work for more hours in a day. 61.7% SCs and 60% STs reportedly work for over 14 hours a day, while only 16% of the drivers from the General category work for the same number of hours.

Working hours: A majority of the respondents i.e. 31% of them reportedly work for over 14 hours a day, 60% work for at least 12 hours a day, and a whopping 83% of the driver respondents work for at least 10 hours a day.

Distance travelled: The intensity and quantum of work undertaken by the Ola and Uber cab drivers can also be estimated with the kilometers travelled by them. While 36% of them reported to be driving 150 to 200 Kms a day, 28.5% reportedly drive 200-250 Kms every single day.

Average Sleep time: 79.4% of the respondents are able to sleep for 5 to 7 hours, while only 8.8% are able to sleep for an adequate number of 8 hours and above. Almost 12% respondents reported that they slept only for 2 to 4 hours a day, thus barely getting any sleep.

Weekly offs: A glaring 40.7% of driver respondents said that they were not able to take a single day

off in the week.

Leisure time: 66.6% of the respondents are getting very little or no leisure time at home, and 30.7% are not able to spend any time with their family.

Customer behaviour: 72% of the respondents said that the issue of customer behaviour affects them in a negative way.

Physical health: Only 0.7% respondents said that they faced no physical health issues because of their work, while almost all respondents complained of 1 or more physical ailments like back pain, knee pain, headache, BP/cholesterol/heart issues etc.

Mental health: Around 80% have experienced some form of anxiety, depression, irritability or stress due to their work. Only 1.5% of the respondents reported facing no mental health issues at all. This indicates how mentally draining and precarious this work is.

ID block issue: 64% of the respondents said that the issue of ID block or deactivation affects them negatively.

Net Daily earnings: 43.10% of the respondents earn below 500 INR a day after deducting all expenses (food, fuel, etc).

Difficulty in managing expenses: 72.2% of the respondents expressed difficulty in managing their work related and household expenses. 68% respondents even reported that their overall expenses exceeded their earnings. This shows that the majority of the cab drivers are in debt-like conditions.

Satisfaction with current fares: 80.3% of the respondents are not satisfied with the current fares.

Unexplained and arbitrary deductions by app companies: Almost 68% respondents reported that they faced either "unexplained" and "arbitrary" deductions due to skewed app algorithms; deductions due to arbitrary commission rates charged by the companies or arbitrary deductions on online payments.

Commission rates: Almost 35% of the respondents believe that the companies are charging 31-40%

commission rate per ride. 23.7% drivers even reported the commission rates to be as high as 40-50%.

The above data therefore brings out startling facts and trends among app-based cab drivers in India - whether it is about their earning levels, health issues faced, working hours and work-life imbalances, and other insecurities such as the issue of ID deactivation, customer misbehavior or incidents of violence at work.

The focused group discussions among the respondents revolved around the above issues and some of the suggestions that came out of the discussions have been shared below as recommendations.

The above points conclusively show how overwork and self-exploitation have become the hallmarks of the industry, especially in light of poor earnings, debt-like conditions and various insecurities faced by the app-based cab drivers. This industry cannot be sustainable, particularly under the current level of earnings of the drivers.

It is therefore, necessary to undertake certain urgent measures for the well being of the drivers and the industry. Multiple mechanisms need to be put in place, in order to increase the wages of the drivers and eliminate the precarity that they face.

This could be achieved through one or more of the recommendations below:

1. Drivers should be treated as employees and assured at least equivalent of minimum wage for skilled workers, for all logged in time (not just duty time).

2. Until the treatment of drivers as employees is not put in place, following aspects of a ride must also be compensated:

- **dry runs and long pick-ups or return rides**
- **excessive time spent in traffic**
- **hours spent on idle time or waiting time for rides**
- **cancellation by customers**
- **loss of income due to fuel and other price hikes**

3. In addition to the above, a standardised metered rate of fares and standardised commission rates must be enforced with the former pegged to the consumer price index,, especially the fuel price index.

4. Similarly, not only must the commission rates be standardised and not exceed 20% ensuring that at least 80% of the ride fare goes to the driver, also indicated in the Motor Vehicles Act. This can be achieved through data transparency, on every ride.

5. All of the above actions can improve the earnings of drivers only if one additional condition is met: **An eventual control on the number of cars on the street:** An oversupply of cars as it currently exists,

is driving the wages down, and the solution for this would be to index the total number of cars allowed in a metropolitan area, to occupancy rates of the service provider.

6. *Terms of Employment:* Almost all digital platforms tend to set unilateral and discriminatory terms of employment. Their contracts are voluminous and biased - absolving the platforms of all legal responsibility and are written in very technical legal language which is not understandable by any driver or rider. The government should, therefore, proactively intervene and direct its authorities to put a stop to this persisting discriminatory and non-transparent contracting practice in the platform economy. It should direct the platforms to devise contracts which are simple and understandable by the drivers/riders and made available to them in their native language.

7. *Health and Safety:* The workers are exposed to various health and safety risks, such as road accidents, occupational hazards, illnesses, violence, harassment; and physical and mental health issues as clearly

brought out in this report. The platform companies tend to shirk from their responsibility to provide health insurance and compensation for injuries or fatalities to their workers. Although these companies do claim to provide accidental insurance to the workers, often the terms and conditions are never fulfilled, preventing the workers from accessing these schemes that these companies advertise.

The regulatory framework should be such that the companies are made liable to provide the insurance and benefits to the aggrieved worker. The provisions of the Code on Social Security 2020 which offers social safety net to gig and platform workers should be implemented immediately, particularly those relating to life and disability cover, accident insurance, medical, health, maternity benefits, sick leave and old age protection over and above social security benefits like ESIC (Employees' State Insurance Corporation), EPF (Employee Providend Fund) and gratuity

8. *Deactivation of IDs:* The workers are subject to arbitrary and unilateral deactivation of their IDs by the platform companies, without any prior notice or due process. The deactivation can be based on various reasons, such as low ratings, customer complaints, technical glitches, etc. The workers don't have a proper recourse or grievance redressal mechanism to challenge or appeal against the deactivation. These deactivations result in loss of livelihood and income for the workers.

Therefore, there should be a clear provision for workers' grievance redressal and fair hearing of the worker should be undertaken before any penal action like ID deactivation against him/her.

9. *Working Hours:* The workers have to work long and irregular hours, often exceeding even 14 hours a day, to barely make ends meet. The platform companies do not have any limits or regulations on the working hours or rest periods for the workers. The workers also face pressure and are often enticed through incentives from the platforms to work during peak hours or bad weather conditions.

Therefore, there need to be provisions to regulate the daily/weekly hours of work per driver along with considerably improving earning standards.

10. Freedom from discriminatory algorithms and need for data rights: The workers are managed and monitored by the platforms; algorithms, which assign tasks, evaluate performance, impose penalties, etc. With little or no information on how rides are fixed or allotted, how earnings and deductions are decided, the drivers/riders are in the dark in terms of how the algorithms work or are made to work by the aggregator companies. The workers also have no human contact or supervision from the platform companies. These uncertainties therefore often lead to stress, anxiety, discrimination, and exploitation of the workers. The opacity and discrimination of algorithmic decisions is an issue of serious concern.

Government authorities should have an oversight on the fairness of these algorithms and mechanisms for monitoring, implementation and enforcing compliance by platform companies.

Moreover, the gig and platform workers generate and share a lot of personal and professional data with the platform companies, such as their identity, location, preferences, behaviour, etc. The platform companies collect, store, process, and use this data for various purposes, such as profiling, advertising, analytics, etc. The workers have no control or consent over their data or how it is used by the platform companies. The workers also have no access or ownership over their data or how it is valued by the platform companies. The companies have also reportedly deleted the data of aggrieved workers as per their whims and fancies.

Therefore there is dire need for data transparency, data sharing provisions and data rights of the workers.

11. Need for strong legislations and implementation of Social Security Code: In the rapidly evolving world of work, India will have to introduce and legislate fundamental labour rights specific to gig and platform workers. The Central and state governments need to intervene and push for policy implementation to protect the gig and platform workers working in urban services, logistics, delivery and transportation sectors. Importantly, the establishment of the Social Security Fund and the National Social Security Board for gig and platform workers should be enforced at the earliest.

The Motor Vehicle Aggregator Guidelines 2020, a very progressive policy guideline of the present government has been adopted by very few in states. It contains provisions pertaining to income guarantee, health and term insurance, regulation of working hours, training etc. for app-based drivers who constitute a significant workforce in the gig and platform work, and also consist of provisions to regulate the aggregators.

12. ILO Convention 102 as a guiding force for evolving social security schemes: The MOLE (Ministry of Labour and Employment) should develop comprehensive schemes guided by the ILO Convention 102 on Social Security which mandates nine branches. The ESIC and EPFO together satisfy the nine components of social security and have achieved the same for a sizable section of the workforce of the organized sector. Tripartite consultations could help in shaping the schemes. We should not lose this historical opportunity to treat India's workforce equally and also set a precedent for the whole world.

13. Time-bound and independent grievance redressal mechanism: The Department of Labour and the Tripartite Board must ensure presence of platforms for registering, acknowledging and redressing grievances faced by platform basis gig workers in a time bound manner. This should include physical facilitation centres wherein gig and platform workers can register their grievances,

a real time transaction based management information system to track the status of redress, an action taken report within a stipulated time frame and an independent appellate mechanism for unsatisfactory redressed grievances.

14. Improving Women's work on digital labour platforms: Keeping in mind the increasing participation rate of women in digital labour platforms, and considering the socio-economic vulnerabilities they face including prejudices and safety hazards, focussed emphasis and efforts need to be mandated to make their working conditions conducive and safe, and targeted social security schemes and benefits must be implemented in their favour. This also requires infrastructural overhauls such as easy access to clean public toilets, dedicated parking spaces for women, creche facilities and so on.

15. Complementing progressive measures being taken by State Governments: In the spirit of cooperative federalism,

1the Government of India should ensure that any scheme introduced by it only adds to and progresses on existing legal frameworks created by different State Governments. This will ensure that the Government of India does not introduce any mechanism / benefit that is weaker than what has already been formulated by State Governments.

16. Tripartite social dialogue to be introduced in the platform economy: Presently, digital platforms do not engage in dialogue or negotiations with labour unions that represent platform workers on any matters relating to rate cards (wages), working conditions, grievances and disputes. Effective social dialogue between government, platforms and workers' organisations, and sound industrial relations, is necessary for improving wages and working conditions for gig and platform workers, and in promoting sustainable enterprises in the platform economy.

We urge the government to take steps to provide coverage to this large workforce in the Industrial Relations Code 2020. This will pave way for a tripartite system with labour unions, digital platforms, and the government to engage in a social dialogue on various issues and challenges in the platform economy and the emerging and ever-changing landscape of the world of work, thereby increasing the bargaining powers of the workers.

17. Access to easy and cheap credit facilities for the drivers: The study shows how access to credit and high expenses prove to be an entry barrier for many to join the cab hailing services. Provisions for access to easy financing, lower credit and EMIs for cab drivers, especially from marginalised sections like SC, ST communities, migrants, women and elderly should be made available. Transition to EVs should also be made more accessible with help of easy credit and finance facilities.

18. The study highlighted how drivers rampantly faced incidents of ***customer misbehavior, violence at work and safety breaches*** at the hands of stakeholders like customers, company executives and the traffic police.

Just the way a single complaint by the customer makes the company unilaterally take a penal action against the driver, any complaint or grievance raised by the driver against the customer or any authority must similarly evoke prompt and stern action. Customers' awareness and sensitization towards the dignity of the driver should also be focused upon.

19. The aggregator and or the government should also provide on-demand ride hailing/sharing and foods/goods delivery service providers with ***waiting zones, shelter or rest areas equipped with rest rooms***, ***potable water and hygienic toilet facilities*** for both men and women.

*20. **Global standards towards formalising the gig/platform economy:*** Various countries in the world are moving towards formalising the gig and platform workers. The Rajasthan Platform-Based Gig Workers (Registration and Welfare) Act is also an exemplary legislation, albeit limited to workers' social security and data transparency concerns. Most insecurities of the workers arise as a result of extremely low earnings and income instability which needs to be addressed on a priority basis. New York Taxi Workers' Alliance's successful legal and on-ground battles to recognize app workers as employees is an important milestone in this regard. This recognition was also hailed in famous rulings by courts in the UK, Columbia, European Court of Justice - rulings by the Dutch High Court, Madrid High Court and elsewhere on the premise that these gig workers are in a relationship of "permanent subordination" to the companies - thereby dismissing claims of the companies that they are in an "intermediary",

"technology-only", "aggregating" or "partnering" relationship with the workers.

Then, another example is that of Collective bargaining frameworks aimed at formalising on-demand service platforms by Denmark and other Scandinavian nations.

Protection of 'non-standard' workers rights by establishing a general floor wage and baseline array of benefits for on-demand and platform workers by the EU is yet another example worthy of emulation.

PROFILE OF A TYPICAL APP-BASED DELIVERY PERSON

1. AGE

94% of the respondents are between 21 and 40 years of age. 2.1% of those surveyed are under 20 and 3.8% are between 41 and 60.

Legend:
- 21-40 yrs
- 41-60 yrs
- below 20 yrs

3.8% 2.1%

94%
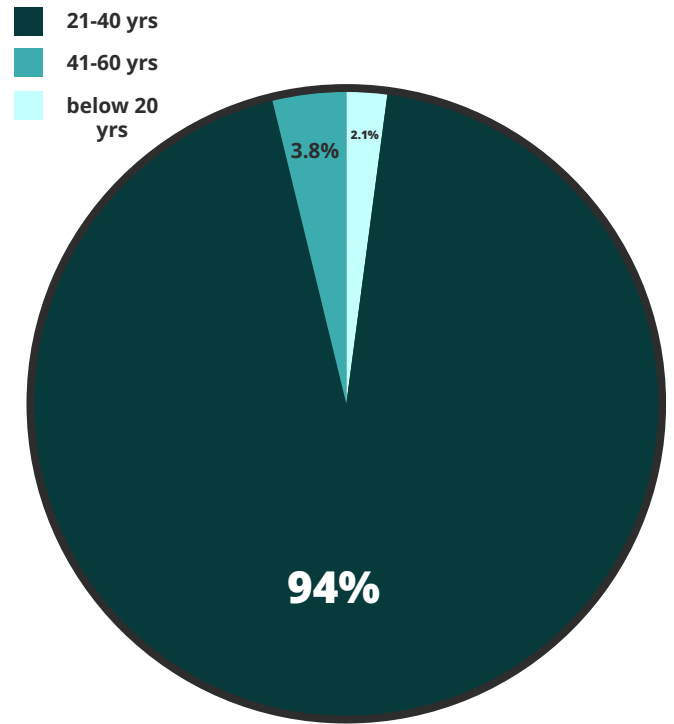
2. GENDER

99.5% respondents are male. Only 0.5% of the total respondents are female. Of the female respondents, 50% belonged to Delhi, 33% to Bangalore and 16.7% to Hyderabad. Indore, Jaipur and Lucknow did not have any female delivery partners, indicating that bigger cities are slightly conducive to females entering this field.

3. EDUCATIONAL QUALIFICATION
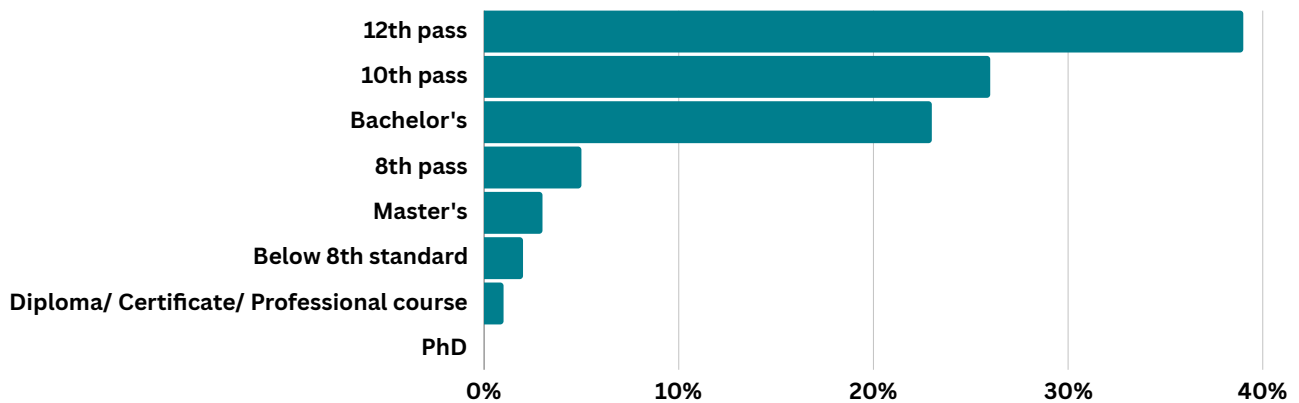
A total of 38.8% of the respondents have passed high school. Out of these, 57% belong to the city of Hyderabad. Around 23.3% of the respondents reported that they were graduates. 68% of graduates belong to Lucknow.

4. MARITAL STAUS

A majority of the respondents (67%) reported that they are married. 74% of such respondents belong to Lucknow.
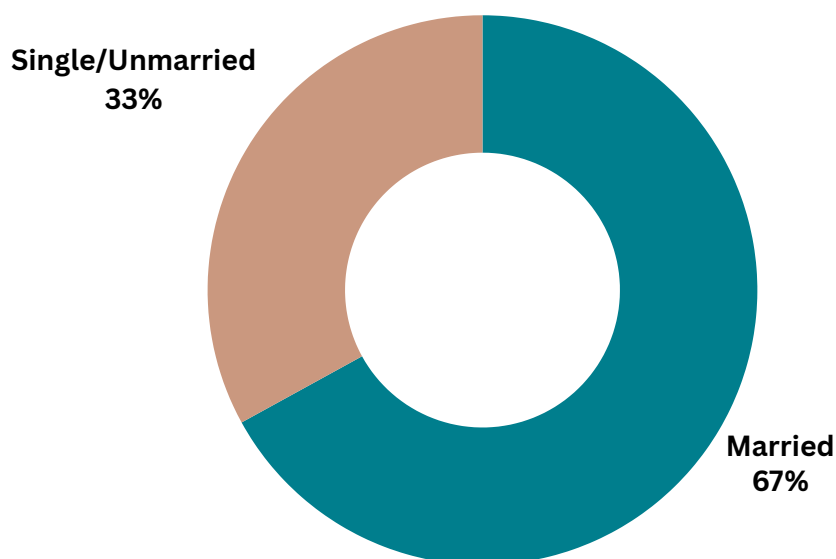
5. NUMBER OF DEPENDANTS
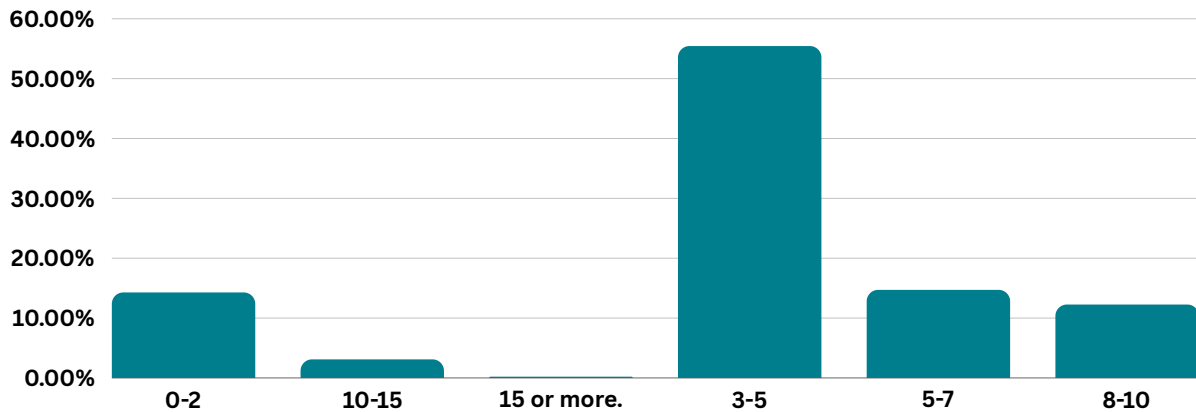
56.5% of the respondents support at least 3-5 family members through this work. A majority of such respondents (73.6%) belong to Jaipur.

6. RELIGION

A majority of the respondents (86.6%) are Hindus and out of these, 97% belong to Indore. Around 12% of the respondents are Muslims and 15% of such respondents belong to Hyderabad.
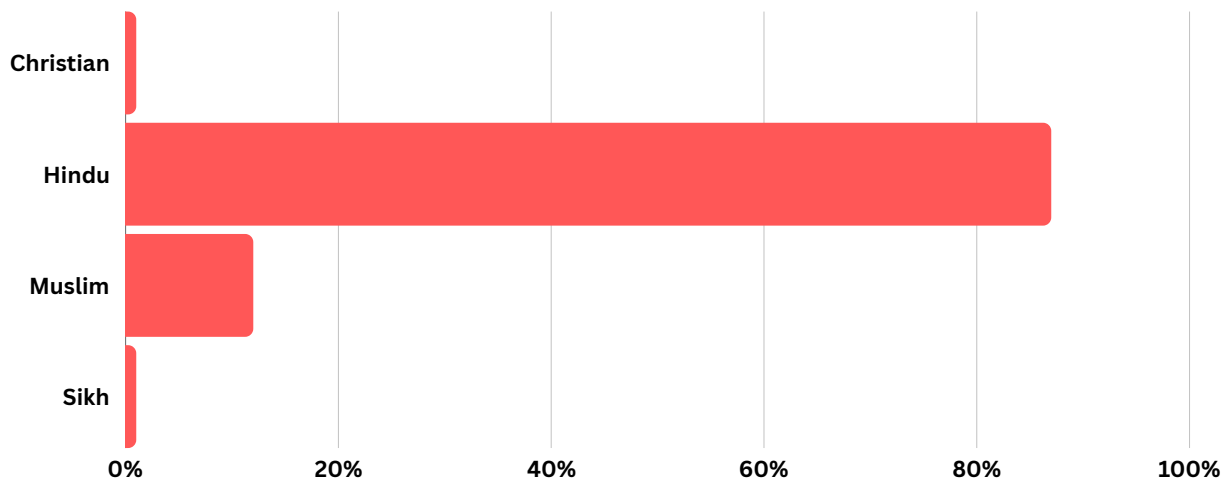
7. SOCIAL CATEGORY
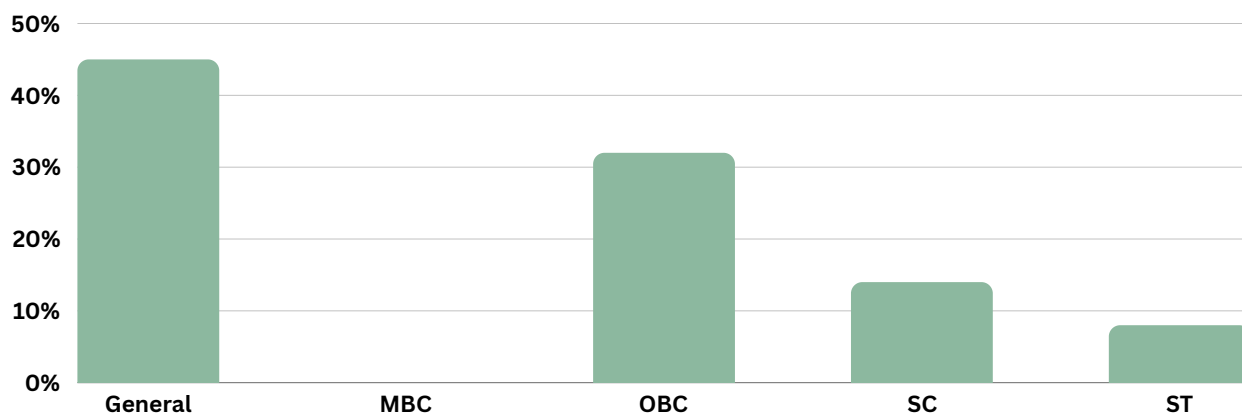
A total of 45.5% of the respondents belong to the General category and 31.8% are from the Other Backward Classes, according to the responses. Hyderabad has the largest pool of respondents belonging to the General category (72%). Among the OBCs, Indore has the majority of respondents (48%). While 18% Scheduled Caste respondents were surveyed in Delhi, 13% of them hailed from Jaipur.

WORKING CONDITIONS OF APP-BASED DELIVERY PERSONS

1. NUMBER OF PLATFORMS (PLATFORM DIVERSIFICATION)

According to the data, 84.5% of the respondents work exclusively for one platform. 98% of such respondents belong to Indore.

Almost 14% of them are working for 2 platforms simultaneously. Among the respondents, only 1.6% said they worked for three platforms simultaneously.
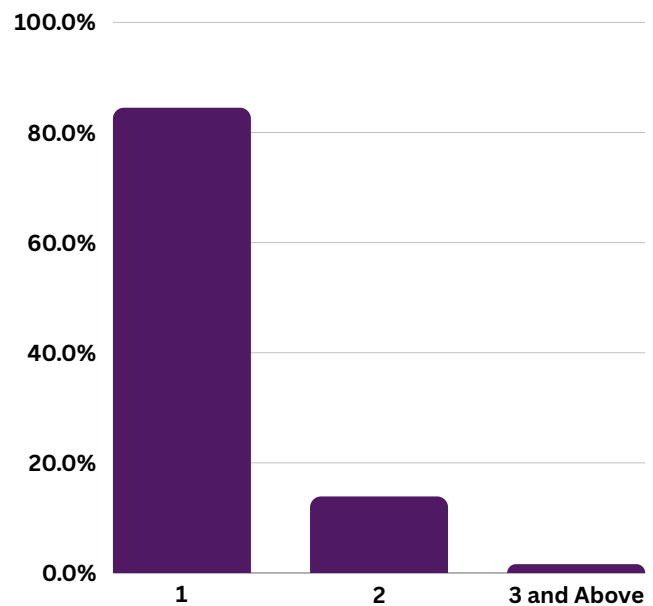
2. TIME SPENT WORKING IN THE COMPANY
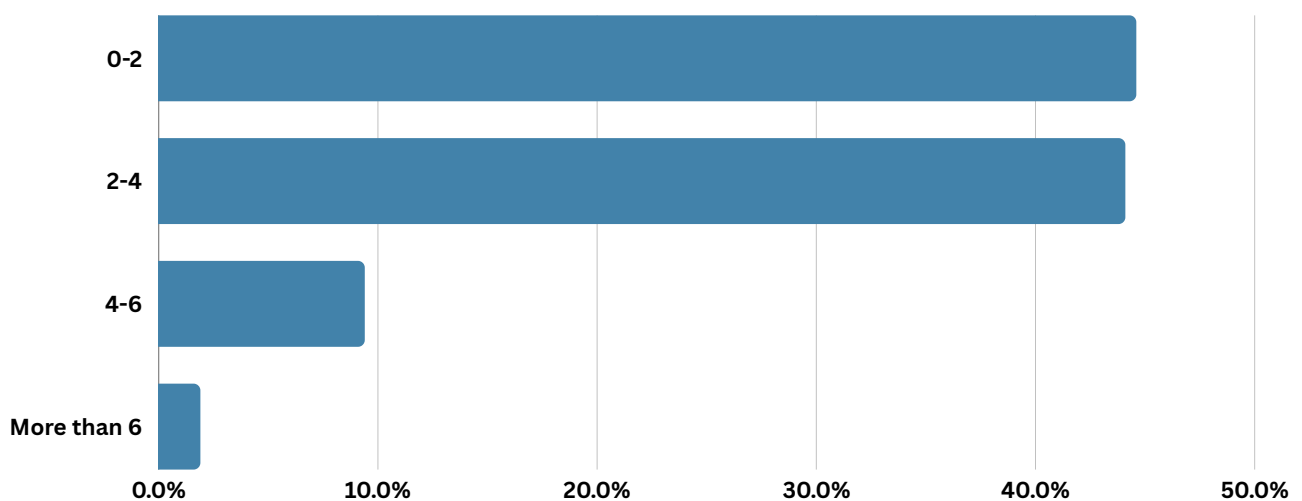
According to the data, 44.6% of the respondents have been working for these companies for 0-2 years while 44.1% have been working for almost 2-4 years. Out of these, Delhi has the greatest number of respondents working for 0-2 years (63.2%) while Bangalore has the highest number of respondents working for 2-4 years (69%). 9.4% of them claimed to have been working for 4-6 years while only 1.8% said that they have been doing this work for more than 6 years.

3. PART-TIME OR FULL TIME ENGAGEMENT
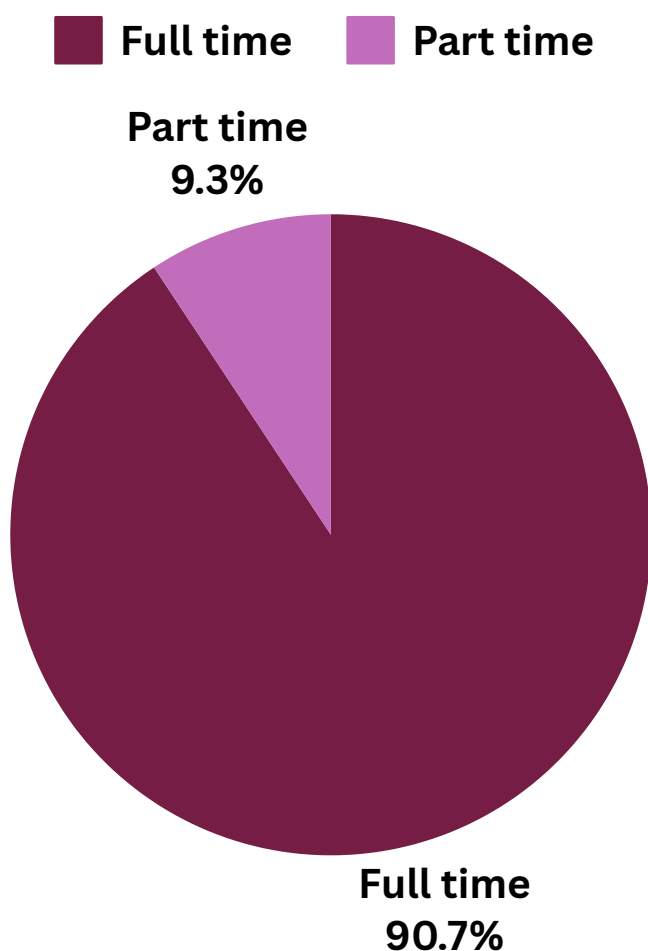
■ Full time   ■ Part time

Part time
9.3%

Full time
90.7%

9.3% of the respondents reported that they worked part-time. Rest, 90.7% of the respondents are employed full time in these companies. Out of the part-timers, 52.4% belong to Hyderabad.

4. PROFESSION PRIOR TO ENTERING THIS FIELD

It was reported by 55% of the delivery persons that they had worked in a private job before entering this field. Out of these, 86.5% respondents belonged to Indore.

5. ALTERNATIVE ENGAGEMENTS IF WORKING PART-TIME

Of those who work part-time in these companies, 41.4% are engaged in some other job as well. Delhi has a majority of such respondents (51%) who are also working in another job. 34% of the respondents reported running a business. Hyderabad has the majority of such respondents (44.3%) who run a business as well. 24% part- timers reported that they are studying alongside doing this work.
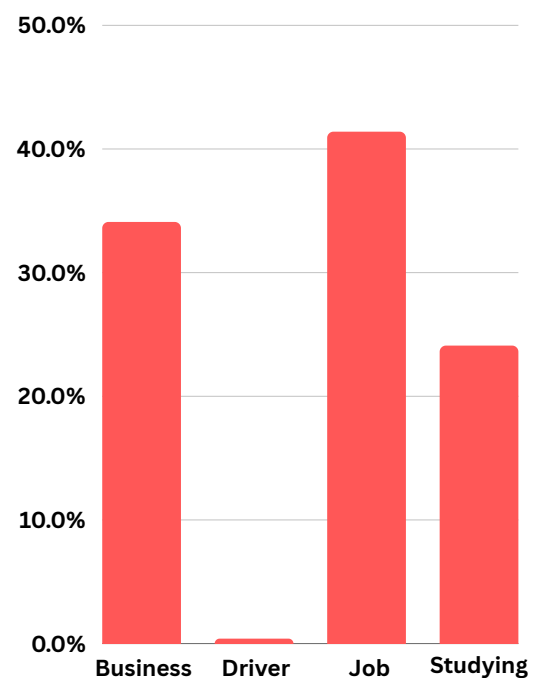
6. VEHICLE USED FOR DELIVERIES
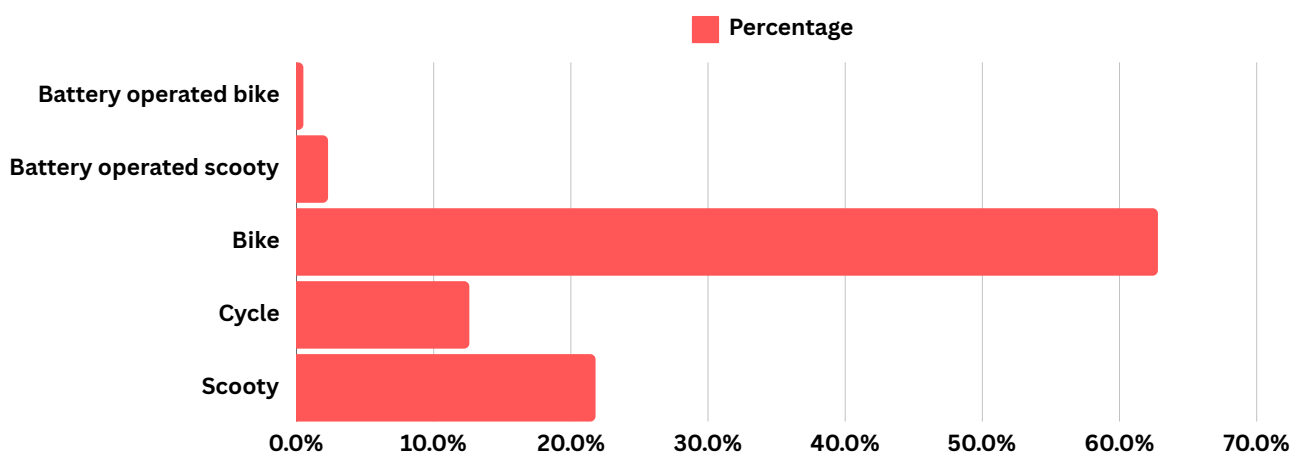
A majority of the delivery partners (62.8%) use a motorbike at work. Of these, 80% belong to Delhi. Interestingly, no respondent in Lucknow, Indore and Jaipur reported using a battery operated bike. The lack of EV infrastructure and development in small cities is evident from this data. Almost 13% of the respondents reported that they use bicycle for deliveries.

7. NATURE OF OWNERSHIP OF VEHICLE
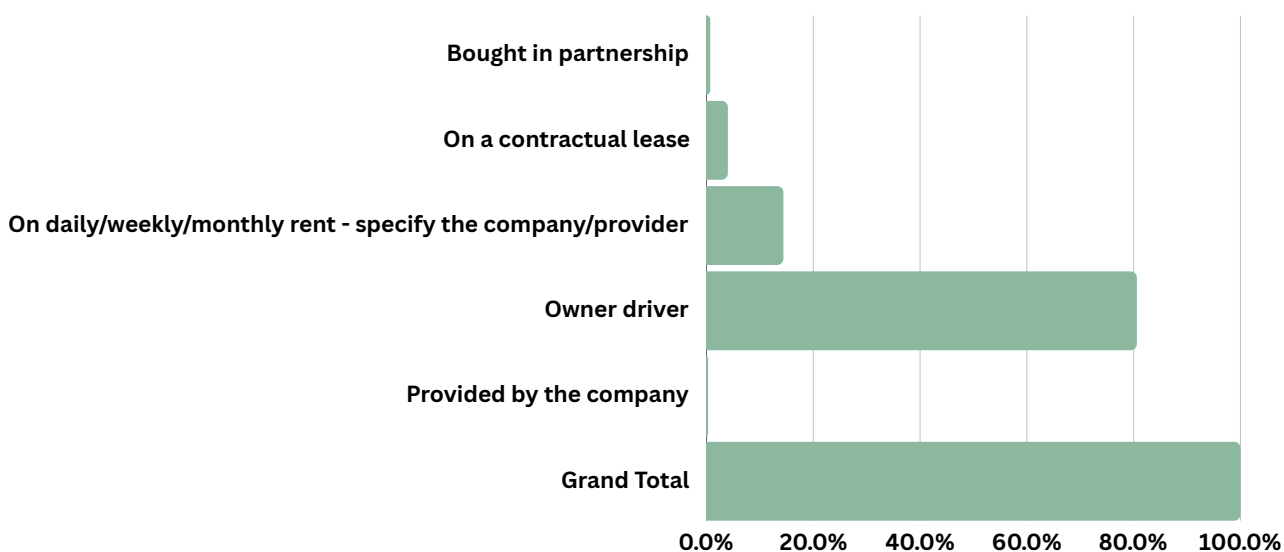
According to the data, 80.6% of the delivery partners own the vehicles they drive at work, while 14.4% of them hire them on rent from a company or a provider.

8. WORKING HOURS
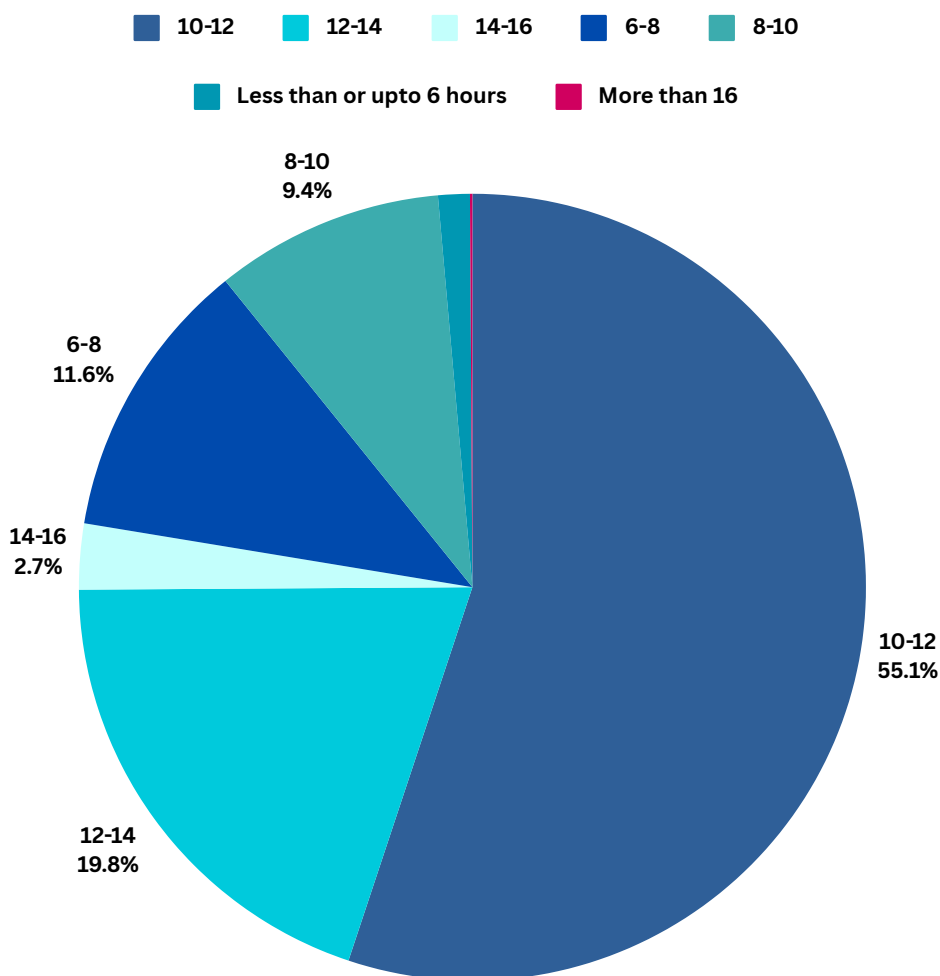
Legend:
- 10-12
- 12-14
- 14-16
- 6-8
- 8-10
- Less than or upto 6 hours
- More than 16

8-10
9.4%

6-8
11.6%

14-16
2.7%

12-14
19.8%

10-12
55.1%

According to the data, 55% of the respondents work for 10 to 12 hours a day, around 20% of them work for 12-14 hours a day. 2.7% reported working for a high 14-16 hours a day.

10. SLEEP

79.4% of the respondents get a moderate (5-7 hours) amount of sleep in a day. 10% reported that they barely get any sleep (2-4 hours) in a day.

In particular, 23% of the respondents from Bengaluru reported that they are barely getting sleep (2-4 hours) at all.

Adequate (8 hrs or above)

Barely (2-4 hrs)

Moderate (5-7 hrs)

0.00% 20.00% 40.00% 60.00% 80.00%

11. DAYS-OFF IN A WEEK

Yes
24.7%

No
48.2%

Sometimes
27.1%
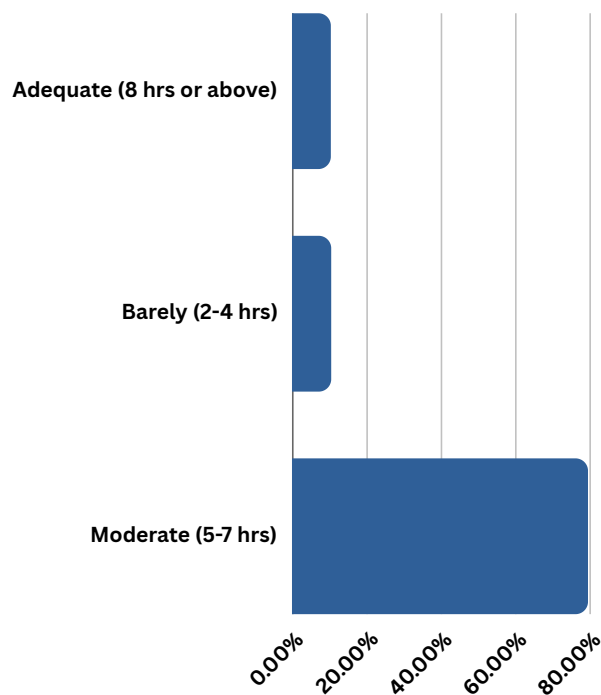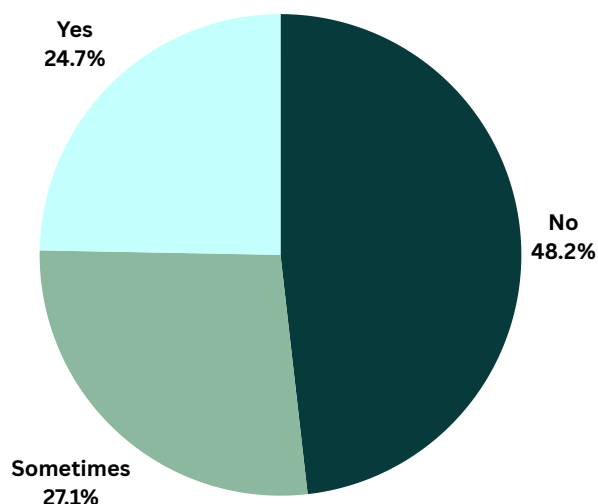
48.2% of the delivery partners responded in the negative when asked if they are able to take at least one day off from work in a week. 26.8% of such respondents belong to Delhi while 26.3% belong to Lucknow. In Lucknow, 92.5% of the respondents said they were not able to get any day off in the week.

12. WAITING TIME

42.8% of the delivery partners said that they had to wait/sit idle for 1 hour for the duties/orders in a day. 34.1% of the respondents wait for 2 hours. In Delhi, 50.1% of the respondents said they had to wait for 2 hours in a day for their orders.
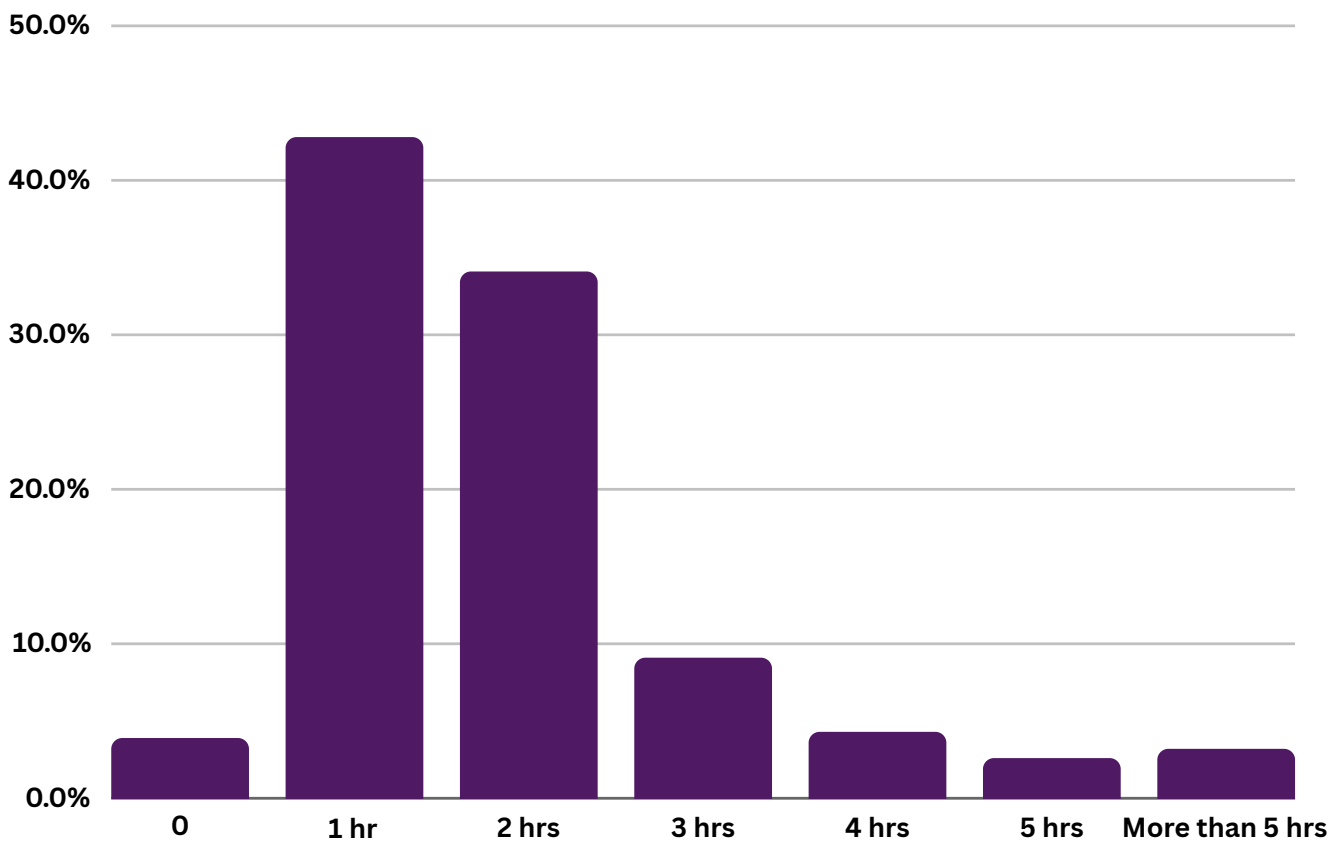
13. QUALITY TIME SPENT WITH FAMILY

49.8% of the delivery partners said they barely (1-2 hours) get leisure time to spend with their family and friends. Out of these, 25.37% belong to Delhi.

17.5% respondents in Jaipur, 12.84% in Delhi and 13.16% in Bangalore even said that they are getting no leisure time at all.
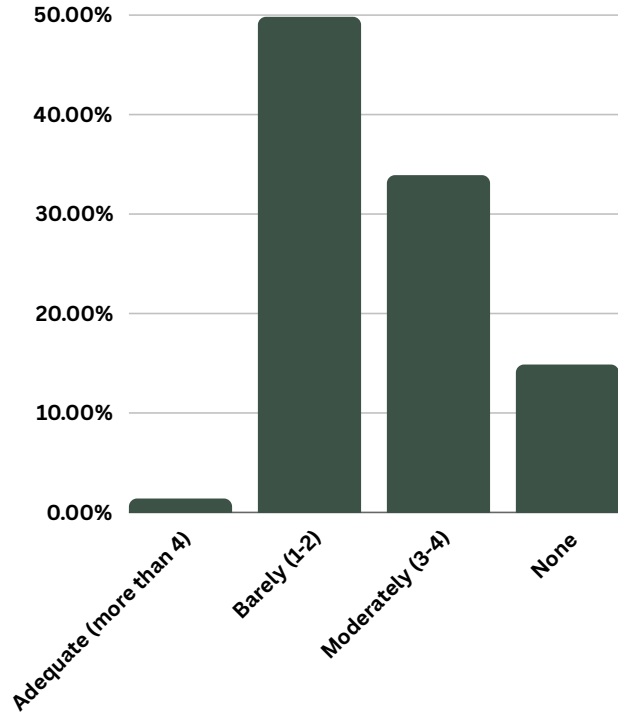
14. VACATION TIME OFF
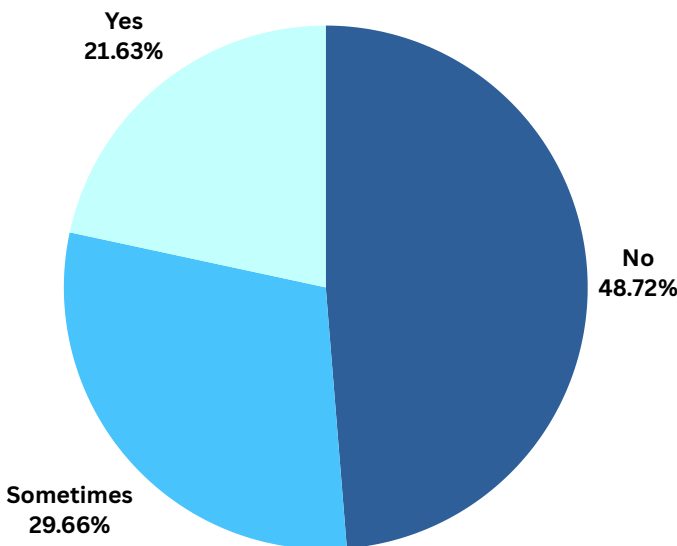
According to the data, 48.7% of the delivery partners reported that they could not find the time, to take enough vacations or family visits in a year (vacation time includes visiting one's hometown/attending family weddings/funerals/personal) Sometimes 29.66% 48.72% vacations/festivities, etc.). Of these, around 39% of the respondents belong to Delhi. In Lucknow, a majority of the respondents (90.91%) were not able to take any time off.

15. ISSUE OF CUSTOMER BEHAVIOUR

Almost 44% of the delivery partners responded in the affirmative when asked if customer behaviour negatively impacts them. A majority of the respondents in Indore (72.38%) reported a negative impact.

No
32.41%

Yes
43.93%

Somewhat
23.66%
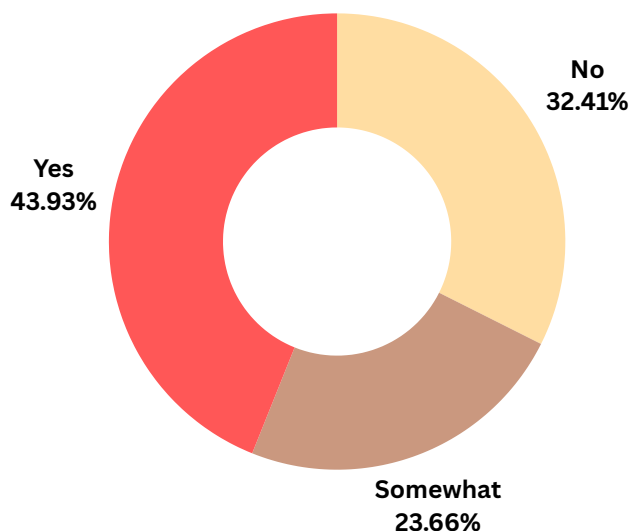
16. ISSUE OF 10 MINUTE DELIVERIES
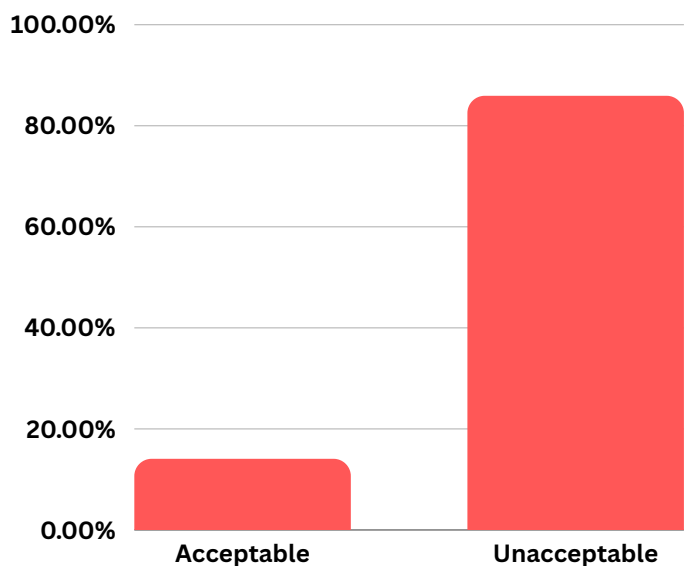
A whopping 85.9% of the delivery partners said that the new policy of 10 minute instant deliveries is completely unacceptable to them. This trend was found to be consistent across almost all the cities surveyed.

100.00%

80.00%

60.00%

40.00%

20.00%

0.00%

Acceptable   Unacceptable

17. VIOLENCE AT WORK

According to the data, 41.5% of the respondents said Yes when asked if they have faced any kind of violence while at work. 81.36% of the respondents in Indore, 60.9% in Bangalore and 51.2% in Hyderabad answered in the affirmative.

Yes
41.45%

No
58.55%
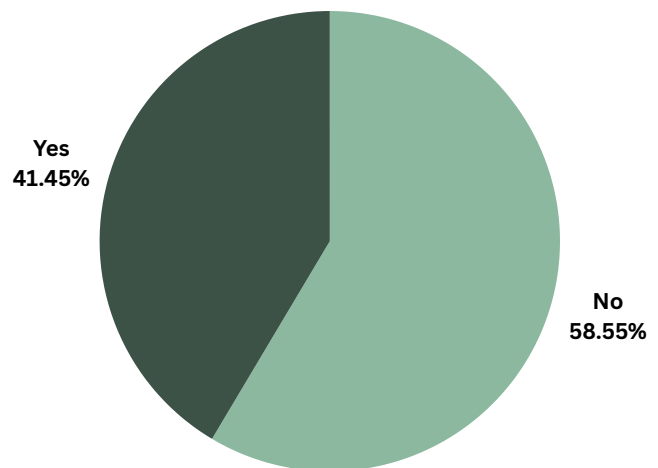
18. SUPPORT FROM THE COMPANIES IN CASE OF ANY SUCH INCIDENT

Yes
17.28%

NA
18.44%

No
64.28%
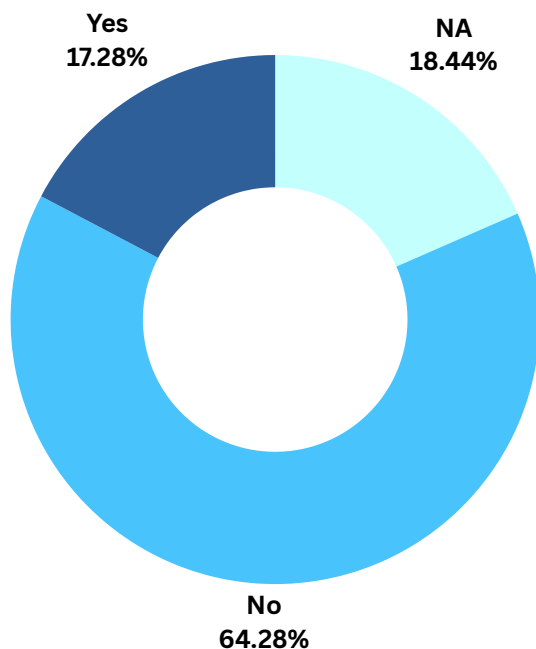
According to the data, 64.3% of the partners reported that they received no support from the company when faced with violence at work. 91.9% in Indore and 51.6% in Bangalore responded in the negative when asked this question.

AVERAGE EARNINGS OF AN APP-BASED DELIVERY PERSON

1. EARNINGS PER DELIVERY

On an average, 35% of the respondents earn Rs 21-25 per delivery. According to the data, 54.5% of the respondents in Bengaluru earn Rs 21-25 per delivery.

83.4% of the respondents in Indore earn Rs 31-35 per delivery, which is more than what a delivery person earns in a bigger city like Bengaluru.

Among those who earn Rs 21-25 per delivery, 39% can be found in Delhi.
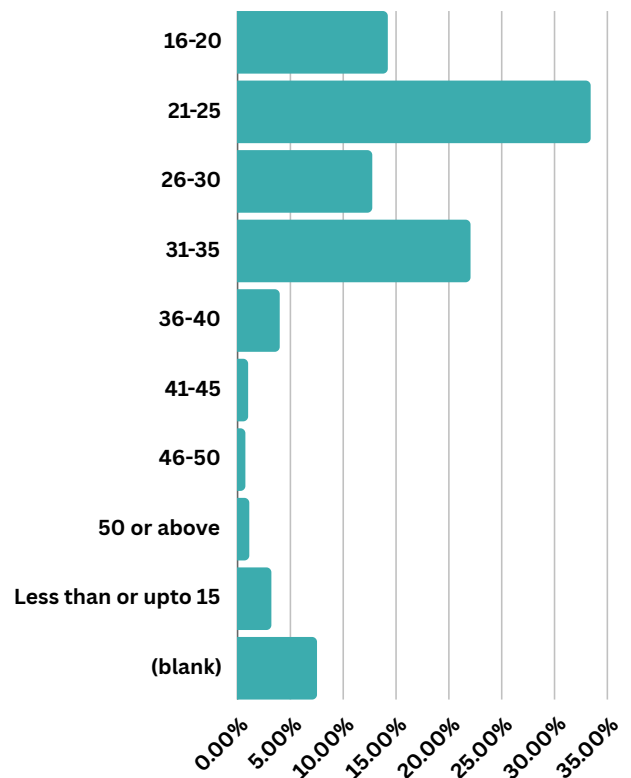
2. DELIVERIES PER DAY
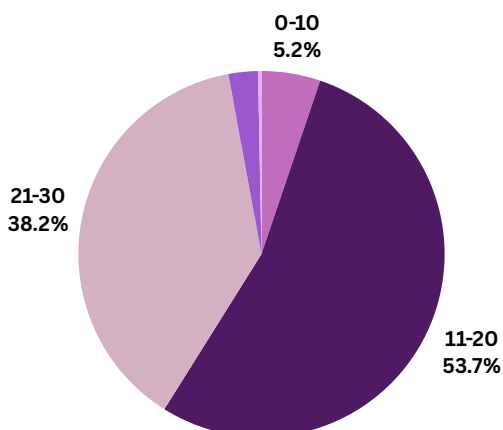
A majority of the respondents (53.7%) make 11-20 deliveries in a day. 33.6% of such delivery persons belong to Delhi. In Lucknow, 75.4% respondents reported that they make 11-20 deliveries each day.

3. DAILY MINIMUM GUARANTEE OR INCENTIVES

47.8% of the delivery persons answered in the negative when asked if they get any daily MG (minimum guarantee) or incentive on meeting daily targets. 25.7% of such respondents belong to Delhi and 25.1% belong to Lucknow. In Lucknow, 87.01% of the respondents said no when asked this question.

**Yes
32.56%**

**No
47.75%**

**Sometimes
19.69%**
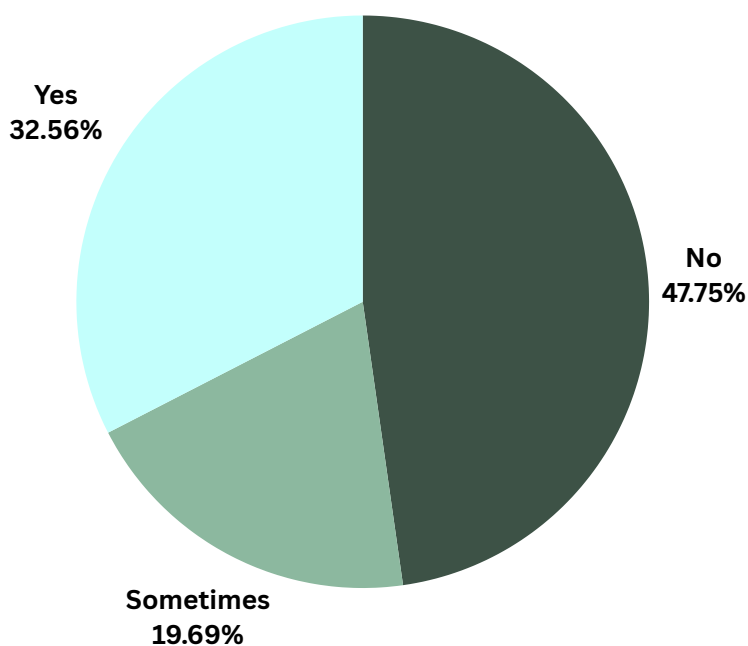
4. DISTANCE TRAVELLED IN A DAY
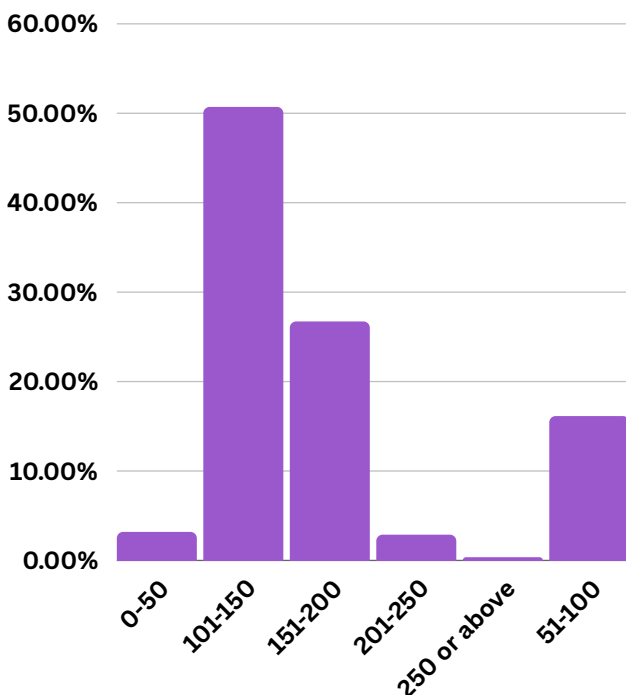
A majority of the delivery persons (50.7%) travel 101-150 kms a day.

 25.2% of such respondents belong to Delhi,

while around 21% of them belong to Indore. In Indore, 84.4% of the respondents said they travel 101-150 kms a day.

5. EXPENDITURE ON FUEL

According to the data, a majority of the delivery persons (57.75%) spend Rs 201-400 on fuel daily. 39.8% of such respondents belong to Delhi, 20.07% to Jaipur and 17.01% to Hyderabad.
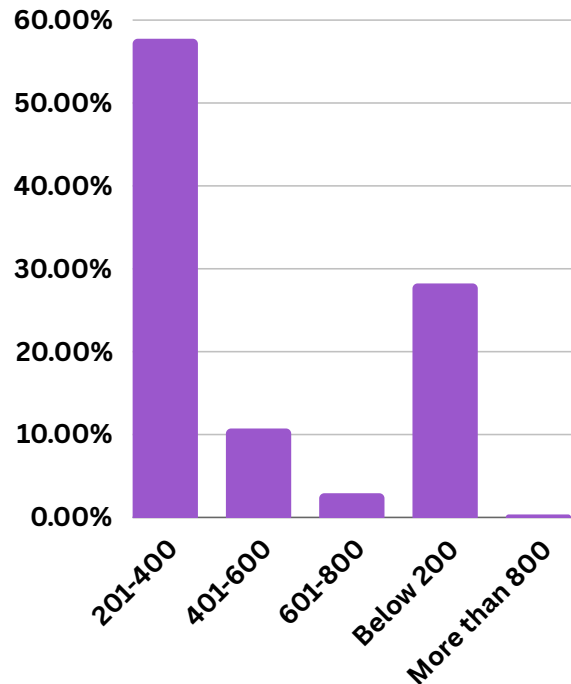
6. EXPENDITURE ON FOOD, TEA, SNACKS, TOBACCO, ETC.
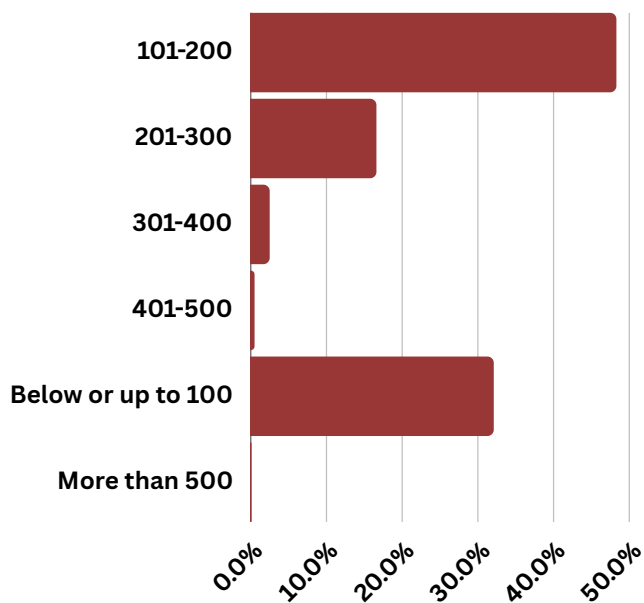
48.3% of the delivery persons spend Rs 101-200 on food items, tea, tobacco, etc daily. 35.5% of such respondents belong to Delhi.

7. NET EARNINGS IN A DAY

According to the data collected, 32.3% of the respondents said they earn around Rs 401-600 on an average daily after deducting their daily expenses. Out of these, 38.5% of the respondents in Lucknow are earning this amount daily. Another, 31.7% said they earn around Rs.201-400 daily. In Bangalore, 48.4% of the respondents are earning this amount.
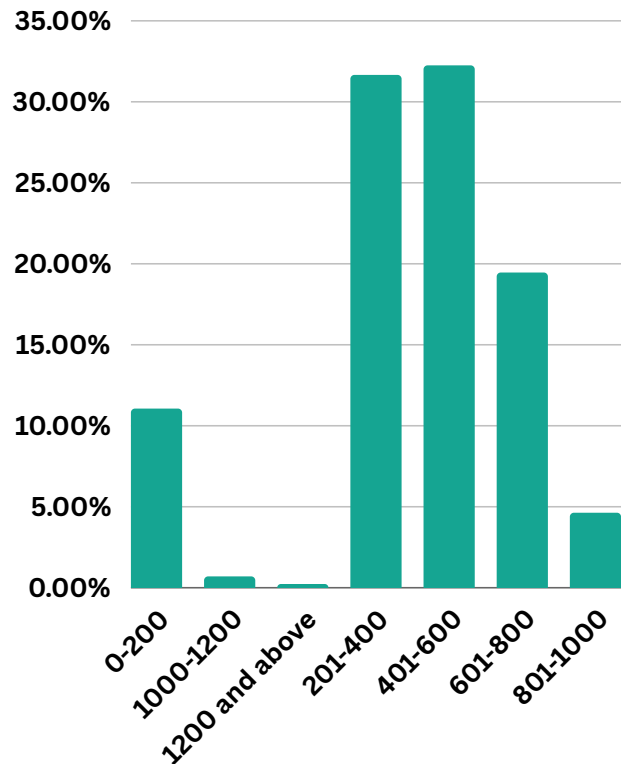
8. MONTHLY EXPENSES ON VEHICLE
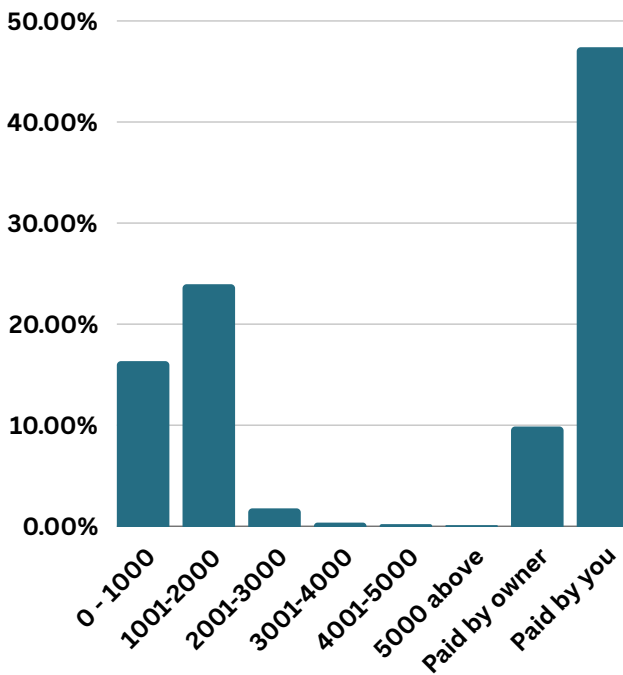
According to the data, 47.4% of the delivery persons pay for their vehicle's repair themselves. Almost 24% of the respondents spend Rs 1001-2000 per month on maintaining their vehicle.

9. MONTHLY HOUSEHOLD EXPENSES

According to the data collected, 32.9% of the delivery persons reported that they spend around Rs 5,001-10,000 per month on their household expenses (including utilities - gas, electricity, water bills/groceries/home loan EMI/education/medical bills). In Hyderabad, 50.31% of the respondents said that they spend this amount per month on their household expenses while in Indore, only a mere 3.16% of the respondents reported spending this amount.

Another 29.7% of the total respondents said that their expenses amount to Rs 10,001-15,000 per month. In Indore, a majority of the respondents or 54.24% reported spending this much on their household expenses whereas in a bigger city like Hyderabad only 12.27% spend this amount per month.
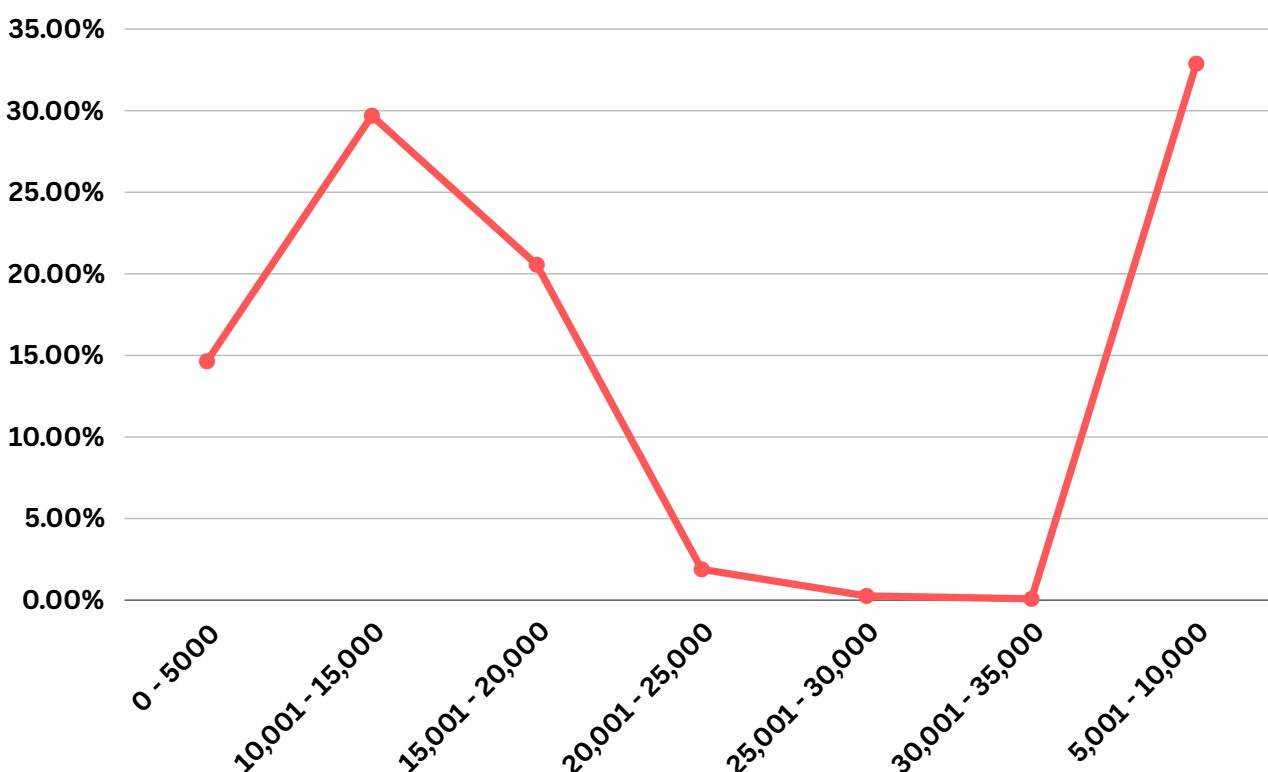
10. MONTHLY NET EARNING

34.4% of the delivery persons earn less than Rs 10,000 a month after deducting all their monthly expenses (maintenance, EMIs, challans etc.). In Lucknow, 69.65% of the respondents said that they earn less than Rs 10,000 a month while in Bangalore only 8.42% earn this much.

In Bangalore, almost 43% of the respondents said that they earn Rs. 10,000-15,000 per month.
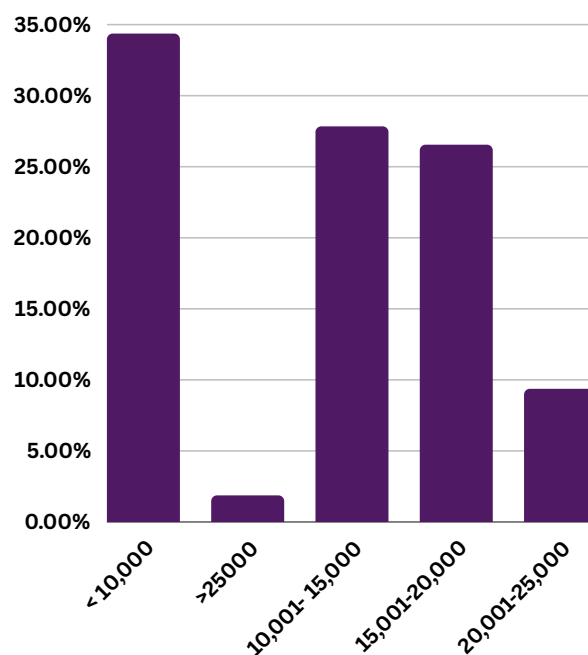
11. CHALLENGES FACED WHILE MEETING EXPENSES
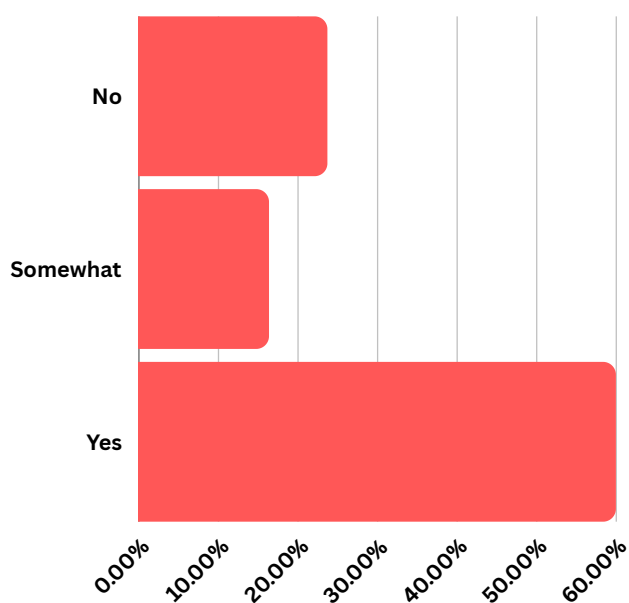
As can be inferred from the data provided, a majority of the delivery persons (60%) reported facing challenges in meeting their monthly expenses. In Jaipur, 73.79% of the respondents reported facing such challenges while in Bangalore 49.15% affirmed the same.

12. EXPENDITURE ON UNIFORM

32.4% delivery persons reported spending around Rs 1101 or above on their uniform (T-shirt, raincoats, jackets, bags, etc.). Of these, 98% belong to Indore while only 1% of the respondents in Lucknow reported spending this amount on their uniform. In Lucknow, almost 42% of the respondents said that they spend Rs 701-900 on their uniform.
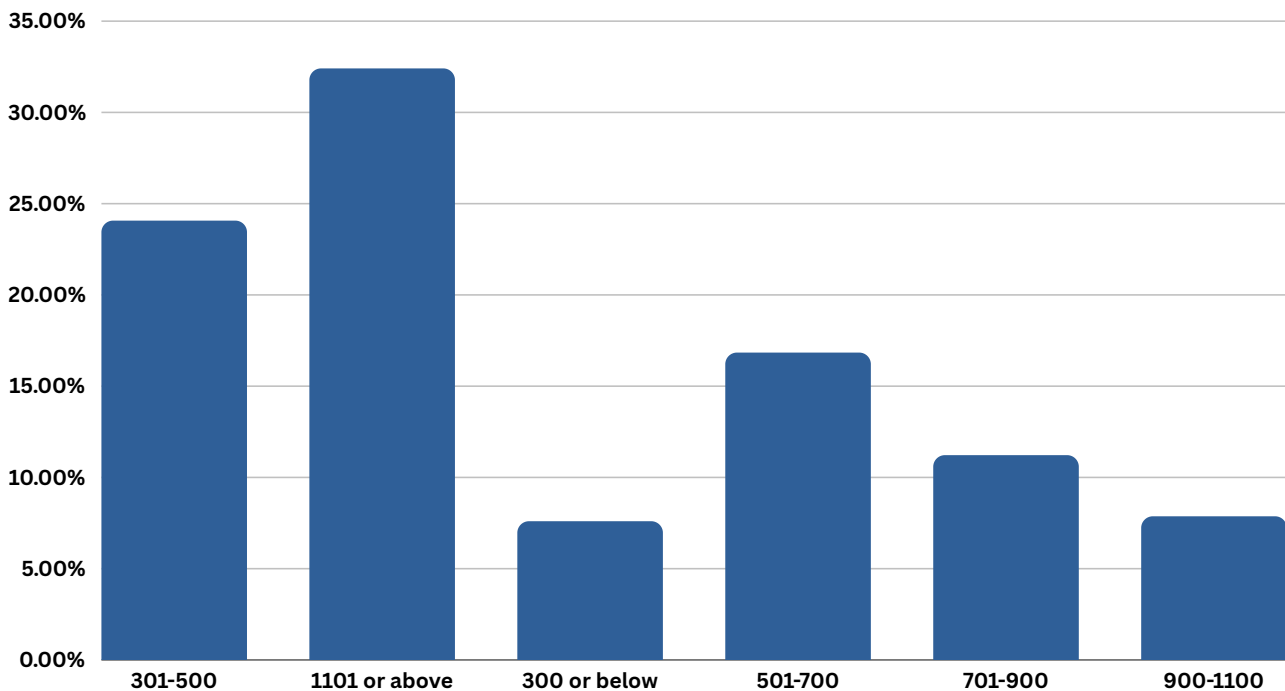
13. ISSUE OF ID BLOCKING AND DEACTIVATION

According to the data, 35% of the delivery persons reported being extremely affected with the issue of ID blocking and deactivation. In Indore, 76.83% of the respondents said they are affected by ID blocking. 26.2% of the total respondents are considerably affected with the provision of ID deactivation. In Lucknow, 61.16% of the respondents are affected negatively. 25.95 % of the total respondents are moderately affected with the provision of ID deactivation. In Bangalore, 47.46% of the respondents reported this. This indicates how the issue of ID blocking/deactivation is more prevalent in smaller cities than in bigger urban centers. The issue of ID block also has serious impact on their earnings which exacerbates this problem.

No issues
13.18%

Considerably
26.02%

Moderately
25.95%

Extremely
34.84%
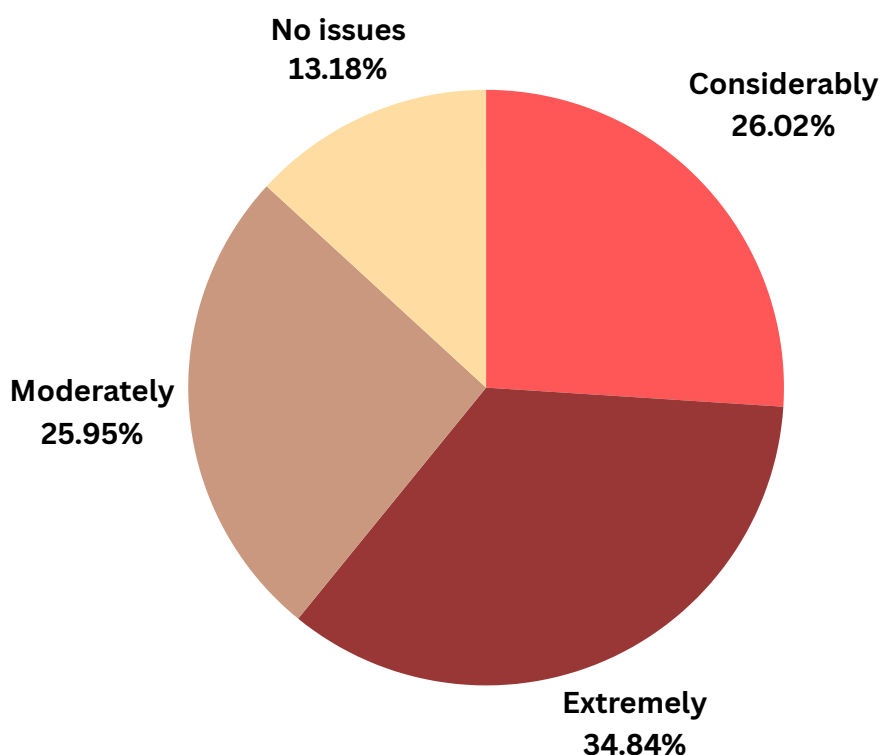
CONCLUSION (DELIVERY PERSONS)

This study on the working conditions of delivery persons has brought to light some eye-opening and hard-hitting facts following a rigorous methodology and field-intensive research.

We collected and analyzed data on socio-economic profiles, working conditions, earnings and other issues of app-based delivery persons from 8 cities of India (Delhi, Lucknow, Indore, Jaipur, Hyderabad, Bengaluru, Mumbai and Kolkata).

The following are the results and interpretations of the on-ground survey (with 55 questions):

Age: 94% of the respondents surveyed were in the age group of 21-40 years. This testifies that a major portion of the young demographic dividend of the country is channelizing their time, energy and skills in this insecure and rewardless industry, and a considerable portion of the young unemployed workforce of the country is trying to find subsistence through gig and platform work.

Marital status: 67% of the respondents were married, which shows that a considerable chunk of them had more dependents and greater financial burden on them, again possibly inducing them to overwork.

Past employment: When enquired about the past employment trajectories of the respondents, 55% of them reported that they switched from private jobs, many of which were reportedly underpaid. This shows the precarity in the labour market, and the inferior quality of jobs available in the private sector.

Education: A total of 38.8% of the respondents had cleared high school (10th pass), which shows that this occupation and industry of delivery does not necessarily require high educational and skill levels, which allows for easy entry into the industry.

Part Time or Full Time Engagement: 9.3% of the app-based delivery persons work part time in this industry, who are either studying alongside, or working elsewhere to make ends meet. Unlike in the western countries, most of the gig workers in India tend to work in the gig economy as their primary source of subsistence.

Sleep time: Over 10% respondents reported that they barely get any sleep (only 2-4 hours) each day, due to the precarity of work in this industry.

Weekly offs: Over 48% of the delivery partners reported that they are not able to take even one day off in a week, which is a cause of extreme worry for the platform economy of India.

Issue of ID blocking and Deactivation: According to the data, almost 87% of the delivery persons reported to being affected by the issue of ID blocking and deactivation in some way or the other.

Customer behaviour: 44% of the respondents said that the issue of customer behaviour affects them in a negative way.

Violence at work: According to the data, 41.5% of the respondents reported that they have faced some kind of violence at work.

Issue of "10 Minute Deliveries": A whopping 86% of the delivery persons said that the new policy of 10 minute instant deliveries is completely unacceptable to them.

Quality time with family: Almost 50% of the delivery persons said that they barely get leisure time (1-2 hours) to spend with their family and friends.

Vacation time off: According to the data, almost 48% of the delivery persons said that they were not able to take enough time off for vacation or family visits in an year.

Daily minimum guarantee or incentives: Almost 48% of the delivery persons answered in the negative when asked if they get any daily MG (minimum guarantee) or incentives on meeting daily targets.

Net monthly earnings: Over 34% of the delivery persons earn less than Rs 10,000 a month after deducting all their monthly expenses (maintenance, EMIs, challans etc.). This figure is way below their guaranteed minimum wage.

Challenges Faced while Meeting Expenses: A majority of the delivery persons (60%) reported facing challenges in meeting their monthly expenses, which clearly indicates the level of distress among the workers in this industry.

RECOMMENDATIONS

- Delivery persons to be treated as employees.

- Assured earnings per day to be at least equivalent to state minimum wage.

- Additional compensation for the following:

  - Dry Run.
  - Time spent in traffic jams.
  - Idle time/waiting time at restaurants for orders.
  - Cancellation by customers.
  - Fuel hike/ inflation allowance.

- Standardize rate of payment per delivery with minimum base rate and then the additional payment calculated on time taken and distance travelled for delivery.

- Mandatory registration of all the app-based delivery persons in government records with state agencies and authorities.

- Simple, transparent terms of employment/ physical copies of contracts to be made available in language understood by the delivery persons.

- Transparency in app functioning, algorithms, incentive systems and payment mechanisms.

- Ensuring health and safety of app-based delivery persons through provisions of insurance coverage, compensation, and overall social security benefits.

- Discontinue "10-minute delivery" policy with immediate effect.

- Avoid multiple pick-up and deliveries in a single trip.

- Stop ID deactivation without proper justification and without hearing the delivery persons' perspective. Adopt `Just Cause, Due Process' principle.

- Cap maximum number of working hours.

- Companies to make all data accessible to the government and personal data to the delivery persons.

- Urgent implementation of social security code, and adherence to principles of ILO convention 102 (social security schemes be administered on a tripartite

basis) employers and workers.

- Time bound and independent grievance redressal mechanism to be put in place by aggregators.

- Tripartite social dialogue to be introduced in the platform economy.

- Government of India to take urgent steps to implement the G20 Declaration of 2023 to extend social protection to workers in the gig and platform economy.

- Promoting safe, friendly and enabling environment for app-based women delivery persons'.

- Access to easy and cheap credit facilities for delivery persons

- Promoting awareness and sensitization among customers towards the dignity of the delivery persons.

- Stop discrimination of delivery persons in restaurants and gated communities, the delivery

persons should be allowed access to elevators and restroom facilities.

From Screenshot Data	Daily	From Survey Data	
Revenue	2770		
Fuel Cost	1124		
Food	200		
EMI/Instalment	507		
Maintenance/Repair	138		
Challan/Fine	67	Average of Qn number 38 Median	18472
Daily	734	Average of 38-a Median/Daily	710
Hourly	61	Average of 38-b Median/hourly	59

Parameters Per Ride	ALL Data (N=1693)	Excluding <20% + negative(N=1183)	Excluding negative Earning(N=1583)
Average of Cash Collected	316.1	351.4	325.25
Average of Driver's Earnings	228.5	233.6	229.89
Average of Distance Travelled (Km)	15.2	15.3	15.30
Average of Ride Duration (minutes)	34.0	33.2	33.75
Average of Deduction Rate(%)	23.9	31.5	26.53
Average of Driver's Earnings/Minute	7.8	8.2	7.84

Key Findings

- **Average percentage of deductions from driver earnings as per the screenshots data: over 31%**
- **Average net earnings per hour as per the screenshots data: INR 61**
- **Average net earnings per hour as per the survey data: INR 59**
- **Median distance traveled per day: 710 Km**
- **Median net earnings per day: 175**
- **So per Km earnings: INR 4**

"Income is like a roll of dice."

"When customers pay with digital wallets like Paytm or PhonePe, the company charges around 920/- for a 40km ride. However, if they pay with cash, the charge is only around 615/-. It's baffling; there's no clarity or consistency in how these charges work."

"Cash payments are pegged at 6 to 8/- per km, while wallet payments soar to 17/- per km. It's like a labyrinth, and when we finally reach the end, deductions—commission, GST, third-party insurance— leave us with a mere fraction of the total bill.

When booking through Ola Money, we're kept in the dark about the total fare. It's revealed only after completing the ride, almost like a hidden surprise. And in that surprise, they slice off as high as 65%, leaving us with a fraction of what was expected."

"Uber shares a similar script. Their average commission goes as high as 50%. It's a tough reality; if Ola provides us with 4 rides, it's like receiving the fare of just one. Sadly, we find ourselves powerless against this company's disparity."

"We're penalized if we cancel a ride, and if the passenger alters the route midway, we face the penalty instead. It's led to instances where drivers have been assaulted. Some passengers plot rides to desolate spots, where they ambush us, taking both the vehicle and our peace of mind."

"We used to be called drivers; now it's 'Ae Ola', 'Ae Uber'!"

"We embraced this path with hopes of autonomy"

"But the reality is different. We're called to give reports if we're late for work, almost like a tether. It feels less like independence and more like bonded labor, trapped within a cycle."

"Back home, everyone dreams of government jobs, but things got worse after the lockdown. This is not a job of choice, but that of compulsion!"

"I used to earn 7-8k back home," he said, reminiscing about life as a village salesboy. Driving brought more money, but it came with its own price. "I miss taking leaves, but at least here I control my schedule."

Delivery boy:

"We go to pick up food in a restaurant, but they tell us to wait outside. We miss our own meals to satisfy the hunger of the customers. Forget about offering water, the customers shout at us, make us climb many floors and disallow us from using their lifts!
Dog bites is a serious issue in this field!"

1. **Name of the surveyor**
2. **How are you filling this form?**
- Face to face
- Telephonically
3. **Name of the respondent**
4. **Survey City**
- Bombay
- Indore
- Mumbai
- Kolkata
- Bangalore
5. **Gender**
- Male
- Female
- Other
6. **Phone number**
7. **Age**
8. **What are your educational qualifications? Please specify name of degree and/ or professional course/ or any other qualification in 'Other' option.**
- Below 8th Standard
- 8th Pass
- 10th Pass
- 12th Pass
- Bachelor's
- Master's
- PhD
- Diploma/Certificate Course/Professional Course
- Other
9. **Marital Status**
- Married
- Unmarried
- Other
10. **Number of family members you support. Please specify details for your response in the 'Other' option.**
- 0-2
- 3-5
- 5-7
- 8-10
- 11-15
- 15 or more
- Other
11. **Which state/ UT are you from?**

12. **Religion**
- Hindu
- Muslim
- Buddhist
- Sikh
- Parsi
- Other
13. **Social category**
- General
- SC
- ST
- OBC
- Other
14. **Which company (or companies) do you deliver items for?**
- Ola Uber
- Meru Cabs
- Gozo Cabs
- Endeavour
- Blue smart
- Other
15. **In the order of importance, enlist 3 issues that affect you the most in your work_____**

16. **For how much time have you been working for this company/companies (in years)? Please specify details for your response in the 'Other' option.**
- 0-2
- 2-4
- 4-6
- more than 6
- Other
17. **What did you do before joining these companies?**
- Private Job
- Studies
- Driver
- BPO/IT related jobs
- Agriculture
- Labour
- Self-employed/business
- Unemployed
- Other_____
18. **Do you work for these companies part-time or full-time?**
- Part Time
- Full-time

19. **If part time, what is/are the other engagements you have?**
- Studying
- Business
- Job
- NA
20. **What vehicle do you use for deliveries?**
- WagonR
- Swift Dzire
- Celerio
- Ritz
- Other
21. **What is the nature of ownership of your vehicle? Please mandatorily specify details in the 'Other' option**
- Owner driver
- On daily/weekly/monthly rent
- On a contractual lease
- Bought in partnership
- Provided by the company
- Other
22. **On an average, how many hours do you do this work in a day? Please specify details for your response in the 'Other' option.**
- Less than or upto 6 hours
- 6-8
- 8-10
- 10-12
- 12-14
- 14-16
- more than 16
23. **On an average, how many rides do you pick and drop in a day, using the app? Please specify details for your response in the 'Other' option.**
- 0-5
- 6-10
- 11-15
- 16-20
- More than 20
24. **On an average, how much distance do you travel in a day through the app work (in Kms)? Please specify details for your response in the 'Other' option.**
- 0-50
- 50-100
- 100-150
- 150-200

- 200-250
- 250-300
- More than 300

25. On average, how many hours do you have to sit idle and wait for the ride bookings in a day?
- 0
- 1
- 2
- 3
- 4
- 5
- More than 5

26. On average, how much sleep time (in hours) do you get in a day?
- 0-50
- 51-100
- 101-150
- 151-200
- 201-250
- 250 or more

27. Are you able to take at least one day off from work in a week? Please specify details for your response in the 'Other' option.
- Yes
- No
- Sometimes
- Other

28. On average, how many offs (in days) do you take from app-based driving work in a month? Please specify details for your response in the 'Other' option
- 1-3
- 4-6
- 7-9
- More than 9
- Other

29. On average, how much quality time (in hours) do you get with yourself or your family daily? (Quality/Leisure time includes family gatherings, outings, movie outings, spending time with kids, etc.)
- None Barely (1-2)
- Moderately (3-4)
- Adequate (more than 4)

30. Are you able to, as per your wish, take enough time off for vacation or family visits in an year (vacation time includes visiting your hometown/attending family weddings/funerals/personal vacations/festivities, etc.)
- Yes
- No
- Sometimes

31. On average, how much do you spend on fuel daily? Please specify details for your response in the 'Other' option.
- Below 300
- 301-500
- 501-700
- 701-900
- 901-1100
- More than 1100

32. On average, how much do you spend on food, tea, snacks, tobacco, etc. daily? Please specify details for your response in the 'Other' option.
- Below or up to 100 101-200
- 201-300
- 301-400
- 401-500
- More than 500

33. On an average, after deducting the above costs (fuel, food etc.) how much are your net earnings in a day, through the app work? (In Rs). Please specify details for your response in the 'Other' option.
- Below 500
- 501 - 1,000
- 1,001-1,500
- 1,501 - 2,000
- 2,001 - 2,500
- More than 2,500

34. On average, what are your monthly expenses on your vehicle's maintenance and repair? Please specify details for your response in the 'Other' option.
- Paid by you
- Paid by owner/ someone else
- 0 - 1000
- 1001-3000
- 3001-5000
- 5001-7000
- 7001-9000
- More than 9000

35. On average, what are your monthly expenses on fines/challans? Please * specify details for your response in the 'Other' option.
- Paid by you
- Paid by owner (if other than you) / someone else 0 - 1000
- 1001 - 2000
- 2001 - 3000
- 3001 - 4000
- 4001 - 5000
- More than 5000
- Other

36. On average, what are your monthly expenses on vehicle instalments/EMI's?
- Already paid by you
- Already paid by owner (if other than you)/ someone else Being paid by you
- Being paid by the owner (if other than you)/ someone else
- 5000 - 10,000
- 10,001 - 15,000
- 15,001 - 20,000
- 20,001 - 25,000
- More than 25,000
- Other

37. What are your monthly expenses on tolls and taxes? Please specify details
- None
- Paid by owner /someone else Paid by customers
- 100 - 500
- 501 - 1000
- 1,001 - 2000
- 2,001 - 3000
- 3,001 - 4000
- 4,001 - 5000
- More than 5000
- Other

38. What is your net earning in a month from this work (after any vehicle-related expenses, ownership arrangement, etc.)?
- Less than 10,000
- 10,001- 15,000
- 15,001-20,000
- 20,001-25,000
- 25,001-30,000

- 30,001-35,000
- More than 35,000
- Other

39. What are your monthly household expenses (utilities - gas, electricity, water bills/groceries/house EMI's/education/medical bills)? Please specify details for your response in the 'Other' option.
- Below 5,000
- 5,001-10,000
- 10,001- 15,000
- 15,001-20,000
- 20,001-25,000
- 25,001-30,000
- 30,001-35,000
- more than 35,000

40. Lately, have you felt any challenge in bearing any of these expenses mentioned above? Please specify details in the 'Other' option.
- Yes
- No
- Somewhat

41. 41. Are you satisfied with the current fares offered by the company? (per km/per delivery compensation)
If somewhat/not, please suggest the fares and rates in the 'Other' option.
- Yes
- No
- Somewhat

42. In what ways do you think the app companies deduct from your earnings?
- Unexplained/arbitrary deductions through the app algorithms Arbitrary commission rates
- Arbitrary deduction on online payments
- Deduction on taxes, third party payments/insurance, etc. Penalties on low ratings due to driver cancellation or complaints

43. How much do you think is the commission rate (%) that the companies are charging on an average per ride? Please specify the details in the 'Other' option
- Don't know/depends 0-10
- 11-20
- 21-30
- 31- 40
- 41-50
- Above 50

44. In which areas do you feel that the companies should additionally * compensate but are currently not compensating you?
- Dry run or compensation on long picks/return rides Extensive time spent in traffic
- Compensation for hours of idle time spent Cancellation by customer
- Company uniform, other accessories, training, cab alarms etc. Compensation for reduced earnings due to fuel and other price rise

45. How much does the issue of ID blocking/deactivation affect you?
- No issues
- Moderately
- Considerably Extremely
- Other

46. What are the likely reasons for you to cancel a duty?
- Long distance pick-ups/Long distance drop offs Personal reasons like having one's own meals/resting
- Pick-ups from inappropriate locations (narrow-lanes, traffic prone routes, unsafe locations)
- Odd timings Vehicle breakdown
- Gender/identity of the customer Rude/inappropriate passenger behavior
- Other

47. Does the issue of customer behavior affect you? Please specify details for your response in the 'Other' option
- **Yes**
- **No**
- **Somewhat**

48. In what ways do you think your work affect you physically?
- Leg pain/foot pain/knee pain Back pain
- Head ache/migraine Blood pressure problem
- Cholesterol/diabetes/heart issues

49. According to you, in what ways does your work affect you mentally?
- Stress
- Anxiety/Panic attacks Depression
- Irritability
- Short temperedness/anger

50. Have you ever faced any violence/abuse during the course of this work?
- Yes
- No

51. If yes, have you received any support (from the company/government or * the law enforcement agencies)?
- Yes
- No
- NA

52. Have you ever experienced an on-duty accident? If yes, have you received * any compensation/insurance claim? Please specify details for your response in the 'Other' option.
- No I've not experienced any accident
- Yes I've experienced an accident and received compensation
- Yes, I've experienced an accident and haven't received compensation
- Don't know

53. Are you part of any union or group pertaining to delivery persons' grievances? Please specify details for your response in the 'Other' option.
- Yes
- No
- Other

54. If not, do you want to join any such union for app-based workers? Please specify details for your response in the 'Other' option.

- Yes
- No
- Other

QUESTIONNAIRE (DELIVERY PERSONS)

1. Name of the surveyor

2. How are you filling this form?
- Face to face
- Telephonically

3. Name of the respondent

4. Survey City
- Delhi
- Lucknow
- Hyderabad
- Jaipur
- Bangalore
- Indore
- Mumbai
- Kolkata

5. Gender
- Male
- Female
- Other

6. Phone number

7. Age

8. What are your educational qualifications? Please specify name of degree and/ or professional course/ or any other qualification in 'Other' option.
- Below 8th Standard
- 8th Pass
- 10th Pass
- 12th Pass
- Bachelor's
- Master's
- PhD
- Diploma/Certificate Course/Professional Course
- Other

9. Marital Status
- Married
- Unmarried

10. Number of family members you support. Please specify details for your response in the 'Other' option.
- 0-2
- 3-5
- 5-7
- 8-10
- 11-15
- 15 or more
- Other

11. Which state/ UT are you from?

12. Religion
- Hindu
- Muslim
- Buddhist
- Sikh
- Parsi
- Other

13. Social category
- General
- SC
- ST
- OBC
- Other

14. Which company (or companies) do you deliver items for?
- Swiggy
- Zomato
- Amazon
- Dunzo
- Fraazo
- Dominoz
- Blinkit
- Shadowfax
- Other

15. In the order of importance, enlist 3 issues that affect you the most in your work_____

16. For how much time have you been working for this company/companies (in years)? Please specify details for your response in the 'Other' option.
- 0-2
- 2-4
- 4-6
- more than 6
- Other

17. What did you do before joining these companies?
- Private Job
- Studies
- Driver
- BPO/IT related jobs
- Agriculture
- Labour
- Self-employed/business
- Unemployed
- Other

18. Do you work for these companies part-time or full-time?
- Part Time
- Full-time

19. If part time, what is/are the other engagements you have?
- Studying
- Business
- Job
- NA

20. What vehicle do you use for deliveries?
- Cycle
- Scooty
- Bike
- Battery operated scooty
- Battery operated bike

21. What is the nature of ownership of your vehicle? Please mandatorily specify details in the 'Other' option
- Owner driver
- On daily/weekly/monthly rent
- On a contractual lease
- Bought in partnership
- Provided by the company
- Other

22. On an average, how many hours do you do this work in a day? Please specify details for your response in the 'Other' option.
- Less than or upto 6 hours
- 6-8
- 8-10
- 10-12
- 12-14
- 14-16
- more than 16

23. On an average, how much do you earn per delivery? Please specify details for your response in the 'Other' option.
- Less than or upto 16
- 16-20
- 21-25
- 26-30
- 31-35
- 36-40
- 41-45
- 46-50
- 50 or above
- Other_____

24. On an average how many deliveries do you make in a day? Please specify details for your response in the 'Other' option.
- 0-10
- 11-20
- 21-30
- 31-40
- 40 or more
- Other

25. Do you get any daily MG (minimum guarantee) or incentives on meeting certain targets in a day? If yes, please mention the amount and details in the "other" option.
- Yes
- No
- Sometimes

26. On an average, how much distance do you travel in a day? (In Kms) Please specify details for your response in the 'Other' option.
- 0-50
- 51-100
- 101-150
- 151-200
- 201-250
- 250 or more

27. On average, how many hours do you have to sit idle and wait for the duties/orders in a day? Please specify details for your response in the 'Other' option.
- 0
- 1
- 2
- 3
- 4
- 5
- more than 5

28. On average, how much sleep time (in hours) do you get in a day? Please specify details for your response in the 'Other' option.
- barely (2-4 hours)
- Moderate (5-7 hours)
- Adequate (8 hours or above)

29. Are you able to take at least one day off from work in a week? Please specify details for your response in the 'Other' option.

- Yes
- No
- Sometimes

30. On average, how many offs (in days) do you take from app-based delivery work in a month? Please specify details for your response in the 'Other' option.
- 1-3
- 4-6
- 7-9
- more than 9

31. On average, how much quality time (in hours) do you get with yourself or your family daily? (Quality/Leisure time includes family gatherings, outings, movie outings, spending time with kids, etc.) Please specify details for your response in the 'Other' option.
- None
- Barely (1-2)
- Moderately (3-4)
- Adequately (more than 4)

32. Are you able to, as per your wish, take enough time off for vacation or family visits in an year (vacation time includes visiting your hometown/attending family weddings/funerals/personal vacations/festivities, etc.) Please specify details in the 'Other' option.
- Yes
- No
- Sometimes

33. On average, how much do you spend on fuel daily? Please specify details for your response in the 'Other' option.
- Below 200
- 201-400
- 401-600
- 601-800
- more than 800

34. On average, how much do you spend on food, tea, snacks, tobacco, etc. daily? Please specify details for your response in the 'Other' option.
- Below or upto 100
- 101-200
- 201-300
- 301-400

- 401-500
- more than 500

35. On an average, after deducting the above costs (fuel, food etc.) how much are your net earnings in a day, through the app work? (In Rs). Please specify details for your response in the 'Other' option.
- 0-200
- 201-400
- 401-600
- 601-800
- 801-1000
- 1001-1200
- more than 1200

36. On average, what are your monthly expenses on your vehicle's maintenance and repair?
- Paid by you
- Paid by owner or someone else
- 0-1000
- 1001-2000
- 2001-3000
- 3001-4000
- 4001-5000
- more than 5000

37. On average, what are your monthly expenses on vehicle installments/EMI's? Please specify details for your response in the 'Other' option.
- Already paid by you
- Already paid by owner/ someone else
- Being paid by you
- Being paid by owner / someone else
- Below or upto 2000
- 2000-4000
- 4001-6000
- 6001-8000
- 8000 or above

38. On an average, after deducting the above monthly vehicle related costs (maintenance, EMIs, challans etc.), what is your net earning in a month from this work? Please specify details for your response in the 'Other' option.
- Less than 10,000
- 10,001- 15,000
- 15,001-20,000
- 20,001-25,000
- 25,001-30,000
- 30,001-35,000
- more than 35,000

39. What are your monthly household expenses (utilities - gas, electricity, water bills/groceries/house EMI's/education/medical bills)? Please specify details for your response in the 'Other' option.
- Below 5,000
- 5,001-10,000
- 10,001- 15,000
- 15,001-20,000
- 20,001-25,000
- 25,001-30,000
- 30,001-35,000
- more than 35,000

40. Lately, have you felt any challenge in bearing any of these expenses mentioned above? Please specify details in the 'Other' option.
- Yes
- No
- Somewhat

41. 41. Are you satisfied with the current fares offered by the company? (per km/per delivery compensation)
If somewhat/not, please suggest the fares and rates in the 'Other' option.
- Yes
- No
- Somewhat

42. In what ways do you think the app companies deduct from your earnings?
- Loss on orders due to spoilt, cold or fallen food Delayed orders

- Delayed orders
- Deductions due to duty cancellations by delivery persons
- Deductions due to logging out from the app before stipulated time (if any) Deductions due to low customer ratings
- Deductions due to taking weekly offs (especially during weekends) Deduction due to changed routes
- Arbitrary changes in per Km/per order fares
- Arbitrary changes in or removal of incentives/MG (minimum guarantee schemes)

43. In which areas do you feel that the companies should additionally * compensate but are currently not compensating you?
- Dry run or compensation on long deliveries /return rides Extensive time spent in traffic
- Compensation for hours of idle time spent Cancellation by customers
- Company uniform, bag, other accessories, training
- Compensation for reduced earnings due to fuel and other price rise

44. How much did you spend on your uniform (T-shirt, bag, jackets, raincoat)
- 300 or below
- 301-500
- 501-700
- 701-900
- 900-1100
- 1101 or above

45. How much does the issue of ID blocking/deactivation affect you? Please specify details in the 'Other' option.
- No issues
- Moderately
- Considerably
- Extremely

46. Does the issue of customer behavior affect you in a significant way? Please specify details for your response in the 'Other' option.
- Yes
- No
- Somewhat

47. What are the likely reasons for you to cancel a duty?
- Completion of targets or shifts Long distance pick-ups
- Pick-ups/drops from or to inappropriate locations (narrow-lanes/traffic prone routes/unsafe locations)
- Personal reasons like having one's own meals/resting Odd timings
- Vehicle breakdown

48. What is your opinion on the issue of 10 minute delivery/instant deliveries?
- Acceptable
- Unacceptable

49. According to you, in what ways does your work affect you physically?
- Leg pain/foot pain/knee pain Back pain
- Head ache/migraine Blood pressure problem
- Cholesterol/diabetes/heart issues

50. According to you, in what ways does your work affect you mentally?
- Stress
- Anxiety/Panic attacks Depression
- Irritability
- Short temperedness/anger

51. Have you ever faced any violence/abuse during the course of this work?
- Yes
- No

52. If yes, have you received any support (from the company/government or * the law enforcement agencies)?
- Yes
- No
- NA

53. Have you ever experienced an on-duty accident? If yes, have you received * any compensation/insurance claim? Please specify details for your response in the 'Other' option.