In search of disciplinable labourers: the emergence of a new labour regime at Wolt food delivery platform in Budapest investigated through the lived experience of migrant workers

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Abstract

This qualitative research project investigates the emergence of a new labour regime at Wolt food delivery platform in Budapest that relies on migrant workers and outsources their management to intermediary fleet companies entailing tighter control mechanisms for these workers. Based on fieldwork conducted between January and April 2025, this thesis centres on the way migrant workers experience this novel labour regime and how they respond to the pressures it creates. It is detailed what makes migrant workers disciplinable and exploitable in this labour regime that seeks to introduce a vulnerable group to the overall workforce to cut costs for the platform. Furthermore, the study includes how despite the fragmentation of the workforce, migrant workers form solidarities and pursue collective as well as individual strategies aimed at improving their position despite the fact that their conditions undermine the possibility of collective organisation to a large extent. The study aims to contribute to our understanding of how digital labour platforms attempt to create new techniques aimed at disciplining workers and the worker subjectivities this process gives birth to.

Keywords: labour migration, precarity, platform work, labour regime

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Table of contents

Introduction

A noticeable change in the Budapest food delivery industry took place by early 2023. Many people picked up the habit of ordering food through delivery platforms during the Covid-19 pandemic and the couriers of Wolt and Foodora – the two competing food delivery platforms – with their respective blue and pink uniforms would become an everyday feature of the streets of the city. In the post-covid era, I would regularly talk to people about the transformation that took place in the Budapest food delivery industry. In the space of a couple months, the courier workforce seemed to have undergone a significant transformation as many of the couriers roaming the streets were from South-East Asia or the Middle-East by this point. The Hungarian press was already filled with articles about a new wave of labour migration involving third-country nationals from the Global South, however, the whole new trend was being primarily framed as the much-needed antidote to the general labour shortage [1][2]. Food delivery was known before as an easy way to make to make relatively good money, but suddenly the share of locals delivering seemed to significantly drop.

These migrant workers were roaming the streets of Budapest as they made one drop after the other, but they remained socially distant and unknown to the rest of the residents in the city despite their physical proximity. As I got to know more about their working conditions, it became clear that Wolt platform has come up with a new type of labour management to integrate these workers into their workforce. They outsourced labour management to subcontractors, so-called fleet companies who became responsible for organising the labour process of these workers. This was evidence of the emergence of a new type of labour regime for delivery platforms since the traditional model based on classifying couriers as independent contractors entailing flexibility and precarity for them came to be supplemented by a new model, one based

[1] https://www.economx.hu/gazdasag/munkaeropiac-hiany-kozvetites-vendegmunkasok.797833.html
[2] https://telex.hu/gazdasag/2024/10/01/vendegmunkas-szigoritas-munkaero-kozvetito-ngm

on outsourcing of management and seemingly offering less flexibility for workers. I became fascinated and wanted to know what motivated Wolt to diverge from the existing self-employed courier model that had been effective at minimizing costs for the platform and why they have relied significantly on migrant workers in the process.

My goal has been to understand this transformation of Wolt platform's labour management technique that combined outsourcing and increasing reliance on migrant labour by situating workers' experiences in the focus of the research. I set out to grasp how migrant workers experienced this labour regime that offered less flexibility and managerial pressures both from the platform and the subcontractor fleet companies as well as how they responded to these pressures and the strategies they came up with in the process. Furthermore, I wanted to grasp what makes these migrant workers particularly desirable for the platform to cut costs and maximize its revenues. I hope to shed light on how platforms' labour management techniques evolve in changing circumstances and thereby contribute to our understanding of the new strategies they might employ to ensure labour discipline and the offshoring of costs onto workers. This could become more important as digital labour platforms face increasing regulatory challenges aimed at reclassifying couriers to employees and new models based on subcontracting could be mobilized to circumvent that. My research is one of the first aimed at grasping new strategies of mobilizing labour by delivery platforms based on the outsourcing of management to intermediary companies. It can contribute to scholarly knowledge about the pressures platforms face to opt for such restructuring of their workforce as well as what type of concrete working conditions are produced by these labour regimes and type of labour subjectivities that emerge in these contexts.

I completed my research in Budapest from January until April in 2025. The following three chapters constitute the backbone of my thesis. The first chapter details the theoretical framework I employed to make sense of the processes that unfolded during my fieldwork with

special emphasis on the gig economy, platforms and labour management. The chapter also involves two sections detailing the history of informal and precarious work in Hungary as well as that of labour migration in the country. My second chapter introduces the subjects of my research and discusses what specific factors make these migrant workers disciplinable and exploitable and how they experience the processes that produce them as such. It also touches upon how the production of this vulnerable part of the workforce relates to the broader business strategies of the Wolt platform. My third chapter is about the strategies migrant workers employ to improve their position and make most of the opportunities available to them. I identify collective and individual strategies that are present in the field and also discuss the obstacles migrant workers face in collectively organising themselves.

Methodology

Throughout my research, I employed non-participant, participant observation and semi-structured interviews as a method to gain access to the layered and complex relations that are involved in the constitution of the food delivery labour regime and attempted to capture the thickness of the field as I was creating it throughout the research period (Adeoye-Olatunde & Olenik, 2021; Dewalt & Musante, 2010; Geertz, 2008). My main entry point to the field was a hub in the city where many couriers would routinely gather waiting for orders. I would spend a lot of time here both observing from a distance and going up to couriers to chat with them, which sometimes took the form of more structured questions and many times more informal discussions where I would let them take the lead. I planned to conduct semi-structured interviews with migrant couriers, however, this proved to be difficult as I could only conduct one such in one take with Amir who became the closest to what one could call a friend in the field. I was lucky, however, that many couriers dedicated their limited free time – which took place mainly between orders – to share their experiences, so I was able to document their stories throughout shorter discussions that repeated during the three months of my field work and also

managed to have shorter one-time discussions with many more fleet workers. I worked as a courier for three days to understand the way the application that provides the interface for the labour process works, however, I could only manage this as a self-employed courier. Had I had longer time for conducting this fieldwork, I would have been able to work for a fleet company and get a better understanding of this specific system from the inside, but I decided to dedicate most of my time to talk directly to the migrant fleet workers with a more limited period available. Furthermore, I conducted semi-structured interviews with a representative of Wolt, representatives of the Couriers' League Trade Union, social workers at an organisation providing assistance to migrants in Hungary called Menedék Egyesület and some Hungarian fleet workers as well. Therefore, I conducted interviews with vulnerable people where the unequal power relations favoured me, but also had to "interview up" with powerful actors in the field, which created different dynamics and entailed a different responsibility for me as a researcher (Puwar, 1997). I also contacted the management of several fleet companies and also labour contracting companies, but either did not receive a reply or was rejected by them. The perspective of these actors who are involved respectively in the management and the mobility of these workers would have been a valuable addition to understand the emergence of the labour regime in question.

My positionality as a white, middle-class, Hungarian certainly limited what I could access in the field. No wonder I was assumed to be an agent of immigration authorities or of fleet companies and could make people suspicious, thereby making it less likely to expose sensitive information to me. At the same time, most workers were generally open to talk to me and would answer my questions. Being perceived as a student in this case could have helped as I was not seen as a threat by others. The language barrier limited what I could grasp since the common language in the field was English, so I could only have meaningful interactions with those who spoke it. This included many Bangladeshi, Pakistani and Indian couriers, but made Vietnamese

couriers generally closed off from my investigation, although they did not interact with any "outsiders" in general.

When it comes to the subject of my research, it has to be said that my understanding of the category "migrant" is not based on attributing some essence to those that fall into it, but identifying a common structural position that produces them as marginalized and exploitable subjects. The point of my research is to tell the story of what it means to be a migrant worker in the specific context I am studying thus filling the empty category with concrete and contextual meaning and also identifying that these groups have commonality with other marginalized ones, who are produced similarly as vulnerable (Rajaram, 2015). I draw on Glick-Shiller to avoid understanding my subjects through the "ethnic lens", which is why I look at several nationalities that occupy the same structural position in this labour regime based on migrant labour (Glick-Schiller et al., 2006).

Chapter one: The gig economy and food delivery

The gig economy is central to the topic of this thesis since the term attempts to capture how the relationship between capital and labour – central to capital accumulation – is being reconfigured in contemporary times. While gigs – a term originating from the musical scene – are not new in any way, gig economy has a more concrete meaning than a sector where people get paid for tasks that are „…short, temporary, precarious and unpredictable, and gaining access to more of them depends on good performance". Based on Woodcock and Graham, the gig economy refers to labour markets where work is mediated by digital platforms and becomes inherently unstable and precarious without the possibility of stable career advancement for workers who tend to be classified as independent contractors. Thus, the majority of the costs that come with work are shifted onto the workers themselves (Graham & Woodcock, 2019). The gig economy tends to isolate workers from one another, which becomes useful for capital for managing the inherent conflict between capital and labour: this new form of labour disciplining leaves workers fragmented and makes traditional forms of working-class organising less effective by obscuring the power relations organising the labour process. The gig economy often relies on extracting labour from marginalized groups such as migrants who lack social embeddedness and thus are more vulnerable vis-à-vis platforms (Altenried, 2021).

A useful way of making sense of precarity – the flip side of flexibility, an often-referenced quality of the gig economy – can be based on the definition provided by Bourdieu. According to him, precarity is a „new mode of domination in public life… based on the creation of generalized and permanent state of insecurity aimed at forcing workers into submission, into the acceptance of exploitation" (Graham & Woodcock, 2019). While the stress on precarity being a „new" mode of domination is incorrect as the novelty of a permanent state of insecurity stems from a position that universalizes the experience of capitalism in the Global North since precarious and contingent work has been the norm for many in the Global South even following

the post-war boom (Munck, 2013). Stable and secure employment was the condition of a big portion of the workforce in the Global North following the post-war boom of fordist production regimes, and has been losing significance since the neoliberal restructuring of the economy. David Harvey characterizes this transition as the restoration of class power of the richest strata of the population, precisely with the aim of privatizing the profits and socializing the costs of production (Harvey, 2005).

Digital platforms signalled a new way of organising labour markets already characterised by precarity on a new and larger scale. The rise of platforms has meant the rise of novel corporate practices that the following quote from the digital futurist, Tom Goodwin seeks to grasp:

> Uber, the world's largest taxi company, owns no vehicles. Facebook, the world's most popular media owner, creates no content. Alibaba, the most valuable retailer, has no inventory. And Airbnb, the world's largest accommodation provider, owns no real estate. Something interesting is happening (Peck & Phillips, 2020).

Platforms decrease their capital stock to the bare minimum and provide a digital infrastructure that connects buyers and sellers while generating data from these interactions to grow in size and have the capacity to make greater rents through commission from these interactions (Srnicek, 2016). Rent-seeking behaviour is not unique to platforms, however, as it has been a central feature of extractive capitalism that was historically underpinned by imperialism and has often relied on the devaluation of the labour of racialized and gendered populations (Higginbottom, 2014). Platforms display monopolist tendencies driven by network effects since the greater number of consumers, businesses and workers are involved in them, the more efficient and valuable they become and the less it is an option for the parties involved not to be present on them (Vandaele, 2024). In the gig economy, platforms bring together the supply and

demand of labour power by providing the infrastructure that connects the sellers and buyers of labour (Graham & Woodcock, 2019).

The preconditions for the emergence of these labour markets are social and political economical in nature such as the availability of cheap technology, consumer attitudes, gendered and racialized relations of labour, desire for flexibility, state regulation, worker power and globalization (Graham & Woodcock, 2019). This thesis will precisely focus on some aspects besides technological consideration by attempting to make sense how Wolt food delivery attempts to create a vulnerabilized and disciplinable segment of the workforce to support its growth model and the way workers experience and respond to these pressures.

Food delivery platforms

Food delivery platforms are a specific industry of the gig economy. These platforms connect consumers primarily with restaurants – although their portfolio has been diversifying – while drawing on the labour of a vast pool of workers in specific urban areas to make the exchange of goods being consumed possible. Therefore, delivery platforms are geographically tethered platforms, which means they are also more limited in geographical scope as opposed to cloud platforms where workers can be virtually contracted for online tasks from any part of the globe provided they have internet access (Vandaele, 2024). In the case of food delivery platforms, this entails that localized labour markets have to be created and the supply of cheap labour needs to be ensured for the smooth functioning of platforms. One way of doing so is relying on migrants to ease the challenge that tight labour markets create for food delivery platforms and their revenues.

Food delivery platforms have started operating in the 2010s as the widespread availability of smartphones started becoming the norm throughout the globe making it possible for couriers and restaurants to connect to the digital infrastructure of the platforms (Graham & Woodcock, 2019). The network effect – the fact that the more consumers, restaurants and couriers are

connected to a platform, the more its value increases making it more likely for further parties to also join it – characteristic of platforms entails that first-mover advantages that arise "from positive feedback loops enable platforms to establish strong presence in markets where they arrive first". This business model aimed at rapid growth makes food delivery platforms an ideal destination for venture capital that is characterized as „patient capital" since investors tend to tolerate losses in the short and medium run in the hope of obtaining monopoly rents in the future. Surplus capital following the 2007-2008 financial crash in a period of low interest rates found platforms to be ideal investment targets, however the end of the low inflationary period in recent years also means additional pressure on the model that platforms have been involved in so far. The fact that most food delivery platforms have rarely if ever had a profitable year since their founding can be explained by this (Vandaele, 2024). Wolt, the platform whose operation in Budapest I am looking at in detail through the lived experience of migrant workers employed through third-party staffing agencies has never had a year so far where it did not make a loss (BeBeez, 2024). Platforms thus also tend to offer relatively advantageous rates for businesses and couriers and prices to consumers as they expand to new markets and attempt to raise these as their market presence becomes more entrenched.

Platforms use algorithmic management that requires little or no human interaction as the app connects consumers with restaurants, organizes the tasks, executes surveillance on workers and calculates their renumerations (Gandini, 2019). Algorithmic management isolates consumers from workers undermining the possibility of interaction that makes this type of work more alienating as the relationship between the two sides becomes merely one of economic exchange. Algorithmic management techniques are essential for dealing with the indeterminacy of labour (getting the most output for the labour power purchased) since workers with their own interests and needs refuse to be treated like commodities bought on the market (Woodcock, 2020). The doubly free nature of labour in capitalism – meaning that workers are free to choose their

employer, but also free from the means of production – forces them to sell their labour while employers have to get some sort of cooperation from workers to keep production smoothly operating (Marx, 1990). It is important to make work legible for capital to discipline workers for maximum productivity, which in this case is made possible partly by digital technologies. Employers attempt to create consent in the labour process while aiming for the biggest possible output from labour, however, measures at curtailing the free nature of labour are also called upon in various way as I will also argue throughout this thesis (Burawoy, 1982). While labour power is an abstracted concept aimed at grasping the dynamics of capitalism, capital looks for groups with concrete characteristics that makes the cheapening of labour possible and not only for an abstract labourer. If we look at capitalism as not only an economic system, but a cultural one as well, it is possible to see how "surplus populations" are created such as migrants or women who are "differently included" in the accumulation process, which makes possible their devaluation (Rajaram, 2015) (Mezzadra, 2011).

Algorithmic management allows for the extension of disciplinary control that could have only been possible in the spatial limits of factories before digital technologies. These platforms use soft control mechanisms as well such as surge price areas and tools of gamification such as leader boards ranking delivery workers (Guda & Subramanian, 2018). The "black box" of algorithm is essential to the creation of informational asymmetries aimed at monopolizing data generated on the digital infrastructure and curtailing workers' power to resist platforms' drive to make labour not only flexible, but also cheap for them (Cant, 2019). The combination of algorithmic management and hyper-flexible forms of employment relying partly on migrant labour makes the growth of these platforms feasible as platforms push for piece-rate pay constructions and minimal social protection to shift costs onto workers (Altenried, 2021).

Classifying couriers as independent contractors is crucial for platforms in their effort to cut down on costs, however, this model seems not to be the only and most efficient way in all

contexts to make possible the disciplining and provision of labour. Lately, new nation-wide research in China has shown that in certain contexts and conjunctures, certain measures of de-flexibilization characterize labour regimes of different delivery platforms since moving towards a more employee-like status can better ensure that platforms satisfy demand in all periods. This change of status, however, does not translate necessarily into better conditions and ending precarity for these workers (Sun et al., 2023). In the case of Wolt, new arrangements besides the self-employed model have emerged with important consequences for the overall workforce and one of its competitors, UberEats has been relying on new labour management techniques based on intermediary companies in the German market as well (Bradshaw & Lee, 2021).

As mentioned in this section, the gig economy is a new way of dealing with the indeterminacy of labour power as capital confronts workers who are doubly free. The freedom to choose your employer, however, is not total and context dependent. Several dimensions of the labour process such as the gendered and racialized nature of work and different legal arrangements impact the freedom that workers have in this regard. I will be relying on the labour regime literature to make sense of how work is organised and experienced by migrant workers who are employed by third-party staffing agencies, namely fleet companies. This framework makes it possible to see how labour control is produced in a certain space while pointing our attention to the other important locations and scales that constitute a certain regime of discipline. A local labour control regime provides a relatively stable environment for capital accumulation in a crisis-prone global system. I build on Elena Baglioni and Judy Fugde who use the labour regime framework to investigate how exploitation, disciplining and the commodification of labour power intertwine in any given local labour control regime to create a sustainable regime of accumulation (Fudge, 2019). The labour regime framework can be productively coupled with Nancy Fraser's conceptual distinction between exploitation and expropriation that aims to highlight how certain populations are not only exploited as opposed to unmarked free workers.

They face certain barriers that limit their capacity to a greater extent – such as legal status or racialization – to confront capital and impact their working conditions and thus have to endure greater exploitation (Fraser, 2016b).

Labour migration in Hungary

The story I would like to lay out in this thesis is also about migration since the remaking of the flexibilized labour regimes of delivery platforms relies heavily on the wave of labour migration in the country. Hungary joined the European Union in 2004, which also made the country part of the Schengen zone where the free flow of labour, capital, commodities and services meant that a significant part of the labour force started migrating to western European countries with substantially higher wages. This process has involved both highly educated professionals and skilled manual workers. An interdependent process has been immigration during this period, which saw the arrival of workers from neighbouring countries such as Romania and Ukraine (Hárs, 2020). In the last few years, the general labour shortage has got more severe – although since the end of 2024 unemployment seems to be growing a bit – and the state has been relying on labour inputs of third-country nationals (TCNs) from Asia such as the Philippines or Vietnam to satisfy the labour demand of employers (Stubnya, 2025). The number of extra-EU migrant workers in Hungary has surpassed 100 000 thousand making this workforce highly important for the functioning of the economy across different sectors (Portfolio.hu, 2024).

In 2023, the government passed a new legislation regulating the status of guest workers that ended up making their position more precarious and vulnerable and framed the regulation of foreign workers as belonging to alien policing measures. This made the duration of their visas shorter limiting it to two years that can be extended by one additional year and also prohibited family reunification for unskilled work visas (Bodor, 2024). The new legislation made it much harder for foreign unskilled workers to change employers since their residence permit is tied to their employer and changing to a different higher status work visa also became harder to achieve

for them. A new requirement for receiving a longer-term residence permit is the completion of a Hungarian cultural competences exam and B1 Hungarian level. This resulted in a two-tiered migration regime that gives significantly more rights and opportunities for people receiving residence permit for skilled jobs (Menedék Egyesület, 2024)

The end of 2024 also brought changes to the regulation of labour migration as the number of countries where guest workers are allowed to come from was reduced to three from a list of eleven, only containing Georgia, Armenia and the Philippines. This restriction also concerns those with regular individual work visas such as the significant part of the foreign workers in fleet companies. However, those workers who have residence permits issued according to earlier legislation can still change to the new type of individual work permit after the first of January, 2025 even if their country of origin is not included in the new list of eligible countries. This limitation that significantly reduces the rights of migrant workers is motivated by the general antimigrant rhetoric of the Hungarian government: it aims to ensure sufficient labour power for the economy and attempts to avoid that migrant workers settle permanently in the country to be consistent with its political ideology that seeks to preserve "Hungary for Hungarians" (Gombos et al., 2025). The most recent change to regulation of migrant work was most likely motivated by the 2026 elections and the pressure on government politicians in localities that host a lot of migrant workers and is aimed at limiting immigration to countries seen as more compatible with Hungary according to the regime's ideology (Stubnya, 2025).

In recent years, Tibor Messzmann and Olena Fedyuk's research about labour contracting companies was the only work investigating the significance of the temporary status on workers' lives: this research was completed in 2017 and concerned migrant workers from Ukraine and Romania (Meszmann, 2018) (Meszmann & Fedyuk, 2020). The current wave of migration creates new conditions as Meszmann's research identifies two distinct groups: intra-EU and extra-EU workers, the former of which is limited in movement and thus much more vulnerable

to techniques of discipline. Asian workers belong to the former group as well making almost universal the extra-EU status among unskilled foreign workers thus changing the balance of power between employers, labour-contracting companies and workers.

In the case of guest workers coming mainly from Asia to Hungary, we can speak of on-site relocation. This is the organized displacement of labour: it can introduce a cheaper and more disciplinable workforce. In the current case of Hungary, it is not necessarily the cheapness, which motivates employers (since they are required to receive the same wages), but the number one driver of the transformation seems to be the general labour shortage. However, it should also be said that it is not a general, abstract labourer that companies look for, but specific traits that make certain characteristics desirable for production (Puygrenier, 2023).

Guest workers can be favourable for employers since their social reproduction is "kept at bay": they do not have families to attend to and thus are available for overtime and they cannot easily create families either due to the temporary nature of their stay. Social reproductive work is a basis for capital accumulation and in the case of labour migrants in Hungary, their reproductive tasks are offshored to kinship structures at home, thus they can have most of their time dedicated to work allowing them to be exploited at a higher rate (Fraser, 2016a). They only have to ensure the reproduction of their own labour power and increased pressure is put onto those at home who take care of kins .They cannot easily protest or exit making them reliable labour-power since their stay is tied to their employment, which means that such moves (such as taking part in a strike) could mean that they are deported (Hirschman, 1972). Such legal constraints, however, are not total: one of the biggest trade unions in Hungary boasted of having guest workers members at certain locations in the country (though, they also admitted the obstacles of organizing this group) and the recurrent phenomenon of workers leaving illegally also demonstrates the limits of the power of legislation (Kiss S. Á., 2024)

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The dual frame of reference guest workers have is an important phenomenon that makes guest workers more likely to accept demanding and highly exploitative conditions (Waldinger & Lichter, 2003). Here, I refer to the fact that the locations they migrate from have worse opportunities and lower wages. Indebtedness adds a further layer to why long and exhaustive working hours become tolerable for migrant workers: getting a mortgage on your house or the parcel of land you own to finance going abroad means that losing your job entails losing your (most probably) only property. The enduring period spent labouring abroad then becomes a means to achieve a relatively stable life at home.

I see Biao Xiang and Johan Lindquist's concept of migration infrastructure as capable of capturing the multifaceted relations which are part of the phenomenon of mobility and to see the way they mediate this process. The migration infrastructure in which these workers practice their mobility is made up of diverse actors with diverging interests and their different involvement in the process of mobility can have significant consequences on the condition in which workers produce and live (Xiang & Lindquist, 2014). I wish to embed workers' way of relating to mobile work in these networks of different actors that make up the migration infrastructure as well as their ways of negotiating their position vis-a-vis these different actors.

The gig economy and the food delivery industry in Hungary

It is important to contextualize how precarity and flexibilization manifest themselves in Hungary in a wider historical perspective, so that the rise of food platforms relying on migrant labour can be grasped. The historical trajectory of Hungary also means that this process plays out differently on the semi-periphery of global capitalism than in Western Europe, which is the most widely referenced setting in which scholars investigate the rise of the gig economy. Hungary being on the semi-periphery entailed that its evolving models of accumulation have been dependent on transfers from the core of global capitalism such as investment and credit, which put downward pressure on labour regulations and decreased opportunities for value

capture for the domestic working class and capital. As pointed out earlier, flexibilization and precarization has been part of a longue durée trend from the '70s in the Global North, however, in the former socialist bloc there were similarities around this time in the restructuring of employment, but also differences in the transformations taking place. To sketch out how these transformations have unfolded in Hungary, it is necessary to go back to the crises of the '70s.

The downward phase of the cycle of U.S. hegemony started at the end of the '60s/beginning of '70's. During the downward phase, it becomes more and more difficult to maintain the overall rate of profit resulting in a series of (local as well as global) crises and in the increasing financialization of the economy. In Hungary, this tendency was worsened by the oil shock that made western imports of technology significantly more expensive and led to Hungary becoming indebted as the economic boom that the imported western technology was supposed to boost did not come. As real wages were stagnating, the importance of the informal economy started increasing. A rising number of households were forced to ensure their social reproduction by participating in the informal and formal economy at the same time since legal wage labour provided them with income that would not ensure sustained reproduction in the long run. This source of income continued to be important even after the regime change as the '90s saw more than one million people go into unemployment and precarious semi-legal work could fill in this gap in income for some. Thus, when the first food delivery company, Netpincér started its operations in the country in 1999, it confronted a context with existing traditions of informal labour (Éber et al., 2014).

Following the 2008 global financial crisis, Hungary saw the rise of precarization in the traditional economy through increased use of temporary work agencies, fixed-term contracts and service contracts (Kahancová et al., 2020) . The rise of flexibility and precarity in the formal economy was accompanied by the rise of platform work and platforms benefited from entering a new market where it is normalized for workers to work multiple precarious jobs in an

environment that generally favours the interests of capital to create an investment friendly environment (Kahancová et al., 2020).

Food delivery platforms in Hungary

The first online food delivery service in Hungary was Netpincér – now Foodora – which started operating in 1999 and the company was purchased by the German food delivery platform, Foodpanda in 2014 and and the whole Foodpanda operation was bought by another German food delivery platform, Delivery Hero. The current model for food delivery platforms emerged in 2018 when the Finnish platform, Wolt entered the Hungarian market. Wolt was not only connecting restaurants and consumers, but also provided its own fleet of couriers to make these transactions happen and Netpincér quickly followed suite in adopting this approach (S. A. Kiss, 2021).

As elsewhere, the COVID-19 pandemic gave a huge boost to the expansion of platforms as restaurants could not accommodate clients and a significant part of the workforce was looking for new sources of income amid lockdowns. Both platforms currently active in the country saw the number of restaurants, consumers and couriers on their platforms increase sharply. Foodora's number of couriers nearly more than doubled in 2020 going from 1800 to 4300 and Wolt recorded an increase of almost 5000 from March of 2020 until May of 2021 going from 1000-1500 to 6000 (S. A. Kiss, 2021).

Working as a courier seemed like an advantageous option for many as it was possible to gain a relatively high income at the time. This was also advertised in the press putting emphasis on the much higher than average sums that certain couriers make (although it has to be said that this required significant self-exploitation from these riders) (Urmossy, 2024) (Presinszky, 2022). Many from middle class background joined the courier workforce at the time as delivery work had the promise of significant gains for people involved with cycling subculture even if this was not the only type of vehicle being used by couriers (Nagy, 2024).

The July of 2022 brought a significant change to couriers' life as the tax category – commonly referred to as KATA (Kisadózók Vállakozások Tételes Adója) in Hungarian – was made unavailable to couriers – and other entrepreneurs who issues their invoices to legal entities – by the government as a measure of austerity due to the economic downturn of the post-covid area that saw the budget deficit increase significantly (Csiki, 2022) (Stubnya, 2022). This tax category made it possible for couriers to pay a fixed and relatively low sum of tax as entrepreneurs, which contributed to the fact why the food delivery industry could be inviting for so many people before. Protests took place contesting the decision and couriers were central in organising the demonstrations blocking transport infrastructure, but they failed to roll back the legislation (I. Kiss, 2022). The new tax options available to couriers meant that their tax burden increased significantly and made the hustle of delivery work less appealing in a period where costs of living started rising sharply due to inflation. Under the new tax regime a low income as a full-time courier meant at least twice as big tax burden, but higher earners could see their taxes grew by even more than three times (Szekely, 2024). As a member of the Courier's League Trade Union (Futárok Ligája) put it about the transformation of delivery work during our conversation: "This used to be a sexy job. Like cooler than being a plumber or a gardener". Although as I will get back to this question, this perception of deterioration was not uniquely caused by the change in tax policy.

The Courier's League had a study conducted aimed at grasping how the income opportunities of couriers changed between 2021 – as 2022 was the first year of high inflation in the country, in fact the highest in the EU – and 2023 that turned out to confirm what many had already been experiencing in their daily life before. The study concluded that the rising costs in the two-year period meant that couriers saw their real income decrease by a third if working full-time is taken as the basis of the calculation. This study did not include the costs associated with rising

rents, which were also a quite significant source of extra costs in Budapest and other bigger cities (Szekely, 2024).

An important step for making couriers' working life more predictable and stable could have been the legal option for them to be employees of the platforms as there are precedents for such reclassifications in other countries. In 2023, the Supreme Court presided over a case that made the argument that platform workers working full-time should be given the employee status since their relationship with platforms is not horizontal, but unequal as platforms determine the way in which workers complete their tasks. However, the ruling denied this option (Hos, 2024).

Wolt platform

The focus of my research has been Wolt since migrant workers primarily work for this platform as the competitor, Foodora only works with self-employed couriers, students (among whom also many are immigrants, but have a fundamentally different relation to their work than labour migrants) and pensioners. Foodora's public statement regarding fleet companies details that outrourcing labour to intermediate actors might carry certain risks and the reliability of these actors has to be ensured. However, the company's representative hinted that it could be conceivable that they would also work together with fleet companies in the future (Gombos et al., 2025). Wolt has increasingly relied on fleet companies who employ migrant workers in Budapest to improve its competitive position in the industry through creating a part of the workforce that can be more easily disciplined and exploited to respond to volatile consumer demand. This transformation is what I attempt to trace down in this research.

Wolt was founded in 2014 in Finland and started operating in 2015. The platform – identifying itself as an IT Services company – has expanded significantly since and is present in 30 countries, most of them located in Northern, Central and Eastern Europe. Wolt entered the Hungarian market in 2018 and saw its operation grow significantly during the pandemic. While in 2019 they had 100+ restaurants and 120 couriers, in 2020 the number of restaurants rose to

2000 and the number of couriers to 4-5000. In 2025, 8000 couriers work for them (Illessy et al., 2021). In 2022, the platform was purchased by Doordash, the American platform giant although the platform's existing brand and operations remained intact (DoorDash Completes Acquisition of Wolt, 2022).

Wolt prides itself on having a flexible system for its couriers: most of its workforce has been able to clock in any time, but earlier there was also the possibility to apply for a limited number of shifts where couriers with better overall stats had priority and working a shift meant that the courier would get a guaranteed amount of money for each hour of the shift if they could not make that much money during that period. Foodora on the other hand operates exclusively with a shift system, although without guaranteed pay, but with generally higher rates per delivery than Wolt (S. A. Kiss, 2021).

Fleet companies

Since 2022, the composition of the Wolt workforce has been transformed since fleet companies started to work as subcontractors of Wolt acting as intermediaries between the platform and the workers in contract with the fleet companies. Based on my interview with the representative of Wolt, fleet companies have total autonomy over the way they come up with their internal system, however, this seems not to be the case as I will argue in Chapter 2. The rise of fleet companies largely coincided with the abolition of the previous tax regime for couriers, which made the job seem less favourable to many as the economy was reopening following the pandemic. Fleet companies are the only legal way for guest workers – a specific legal category in the country that includes only foreign workers employed by labour contracting companies – and for people with regular work visas as well as asylum seekers to perform delivery work. According to a Wolt representative, they introduced the measure to allow for people to become couriers even if they cannot join through a student or pensioner organisation and do not want to be or have the option to be self-employed, thereby increasing the potential pool of workers.

Ten percent of their couriers work through fleet companies while 70 percent have self-employed status and the rest work through student or pensioner organisations. Couriers working for fleet companies have work assignment contract as opposed to employment contracts, which seems to be a case of hidden employment with important consequences for these workers: their contract can be ended any time without explanation, they have no right to collective representation and bargaining, no access to minimum wage and there is no legal limit on the hours they can work.

Fleet companies are present in all cities where Wolt operates while migrant workers for fleet companies are primarily present in the Budapest area. Fleet companies free couriers from having to file their own tax reports and to work with accountants and take a certain percentage of the couriers' income – typically between 20-33 % - or a fixed amount each month. Workers can lease bikes from the company or use their own and some fleet companies also provide housing to migrant workers which tends to cost more than available rent in Budapest.

Fleet workers had a shift system: workers would have to book shifts in advance and would receive a guaranteed hourly rate in case they had earnings from deliveries below the sum of the guaranteed pay during those hours. They later changed this and introduced targets: workers needed to average at least 2.1 deliveries per hour and have an acceptance rate of orders over 80 % during their shift in order to get the hourly rate. This shift system for fleet companies was abolished from February in the Budapest region meaning that fleet workers had essentially the same system in terms of clocking in as the rest.

For non-fleet worker (mainly self-employed couriers, students working through trade unions and some pensioners) the work experience looks like this: you open the app and slide the button to go online which means the algorithm starts assigning tasks to you as they come in. Many couriers think that the algorithm prioritizes those with better stats who are in the same area when assigning the task although Wolt denies this (Illessy et al., 2021). When an order appears,

you see location of the restaurants and the customer and you need to slide the button to accept it. While picking up one delivery you might receive an option to accept more from the same area and can then deliver more at the same time. When you hand over the order, you slide the button to signal that it was delivered and then wait for the next delivery to come in. The system is the same for fleet workers with one crucial difference: once the order to be accepted appears, they do not see how much money delivering the order gets them.

Chapter two: Mechanisms of exploitation and disciplining of migrant fleet workers

One day I was talking to an Algerian courier called Amir at Corvin mall, a hub in the city where many couriers gather waiting for orders. He was complaining that there were too few orders as the weather was getting better and was about to go home since staying did not make much sense to him. He quickly mentioned that his fleet company's management is still looking for people from Bangladesh since "they work like crazy, 7 days a week and 12 hours each day. I'm not good for them, I only work 8 hours a day" – he added while laughing. He was not a typical migrant fleet worker as he had no obligation to send money to family back home and shared a household with his wife in Budapest.

The location of our talk, Corvin boulevard ended up being the main site of my research. The boulevard is located next to Corvin mall with plenty of restaurants inside, most of them offer fast food and the boulevard has several restaurants. It is an ideal hub for riders since the area is in central Budapest and has many offices with white collar workers around. Riders would wait on both sides of the entrance to the mall at the end of the boulevard and when I started visiting this spot, one side would be crowded by Vietnamese couriers who were present in great numbers and the other was used by the rest who were mainly from Pakistan, Bangladesh and India.

I will dedicate this chapter to introduce my interlocutors that I met during the two months that I was regularly visiting this site and having at least one conversation with them while they were waiting for the next order to pop up. Some would become regular interlocutors detailing their experience of the food delivery industry and mobile work. My aim in this chapter is to show what makes these workers exploitable and disciplinable as well as what type of costs associated with their work are pushed onto them and how this connects to the overall remaking of Wolt's model of labour management. Thus, I will outline the labour regime of migrant fleet workers that can be grasped as a sustained model for extracting surplus labour from these groups. While

fleet workers in general are exploited in a similar way, it is important to note that the lack of social embeddedness of migrant fleet workers makes it possible for them to be exploited at a higher rate. Thus, I argue that way the labour process is organised for and performed by them can be categorized as a separate labour regime. This labour regime produces these migrant workers as not only exploitable, but also expropriable subjects, thereby creating a cheap and disciplinable workforce.

Introducing the couriers and their trajectory

The couriers who I met during my fieldwork were mostly between 20 and 40 years old and the majority of the people I talked to were from Bangladesh, Pakistan and India. The other main group of couriers in terms of nationality was Vietnamese riders who rivalled Bangladeshis, Pakistanis and Indians in number during the start of my fieldwork. Vietnamese couriers had an important difference compared to the rest of the migrant workforce: they came to work in Hungary through a labour contracting company – and thus had the guest worker visa – that outsourced their labour to a fleet company that seemed to manage uniquely these riders. Thus, there is one extra intermediate actor in their case, the labour contracting company that organises their migration to the country. Although illegal according to Hungarian legislation, these riders had to pay between ten to fourteen thousand euros to get to the country and had to pay extra for expenses that turned out to be unnecessary extra charges from the fleet company such as 25 euros per month for a sim card. Many were quite unsatisfied since they ended up making as much money as to be able to repay the debts they acquired to finance their trip (Gombos et al., 2025). They explained to me how they hoped to help their families back home, but one of the couriers express doubt about the prospects: “I expected to earn around 2000 euros, but only make 1000 a month” – the translation appeared on his phone screen as we were having our conversation. I could only talk briefly with these couriers, but it was much harder to understand their situation based on these conversations since they spoke no English and were generally

suspicious of me, so part of my information about them is through a news report that documented their conditions (Gombos et al., 2025).

The rest of the migrant couriers had individual work permits as opposed to the guest worker permit that can be obtained through a labour contracting company, although both permits make it possible for individuals to spend 2 years in the country that can be lengthened with one additional year. This also means that the migration infrastructure that they use can vary as opposed to Vietnamese whose situations was quite uniform. Many of them learnt about the opportunities through friends and applied through agencies in their country of origin or learnt about the labour mediating agencies through ads in social media. Amir told me that each time he mentions that he only had to pay 600 euros to start working in Hungary, the other riders do not believe him at all. It is also quite common for the rest of these couriers to pay between ten and fourteen thousand euros, thus making it common practice for the non-Vietnamese couriers as well. As one Bangladeshi courier explained to me, the amount one has to pay depends on the number of parties through which his application goes: he was quite lucky as he "only had to pay 8000 euros" since only one party was involved in his case. Amir detailed to me that often, one of the first people who come from a certain location to work for a fleet company end up becoming labour agents and pocketing most of the money. His fleet company first employed Pakistanis as the first labour recruiter that the company had was from Pakistan. They had to change when a scandal broke out concerning the fact that they were falsifying documents, so the new connection became a Bangladeshi labour broker. A migration infrastructure that makes the people in it heavily indebted goes a long way in explaining why my Amir joked about his company preferring Bangladeshis over him: most of the couriers I spoke to work six to seven days a week and twelve hours a day to make back the money spent on the migration procedure and to be able to send meaningful amounts of money to their family back home, which seemed to be the number one priority for most.

The labour brokers who are important actors in this labour regime are sometimes referred to as sellers of dreams who convince people that the "investment" into migrating for work is a worthy one. I managed to get the contact of a Pakistani man who was allegedly helping people come to work as couriers in Hungary. Before talking to him on the phone, I checked out his Youtube channel, which consisted of videos detailing why Hungary and other European countries are ideal for work due to favourable legislation and low costs of living as well as of interviews with couries working in Budapest. One example could be a video titled "Reality of Living in Hungary & How you can earn 7 to 8 Lac [hundred thousand] per month in Hungary I Expenses in Hungary" (Its 4 You, 2025). The channel seemingly targeted Pakistanis and Bangladeshis offering them help with paperwork for visas. While I was on the phone with him, he insisted that he works as a courier and helps people set up their accounts who come up to him on the street, but categorically denied helping people move to Hungary for work. The end of our conversation got heated when I inquired about the Youtube channel and whether it is set up to "help people come here" when he suddenly switched to fluent Hungarian and told me in a loud and frustrated voice "Who are you? Why are you asking these questions?" and then refused to continue the conversation.

A couple of couriers came to Hungary from Dubai where they were also migrant workers. They applied through agencies in Dubai and were lucky to have a more simplified and transparent process and had to only pay a couple thousand euros for the procedure. One of my Bangladeshi interlocutors, Bashir decided to move since he was also doing delivery work in Dubai, but the heat was unbearable for him while others found the managerial pressures in the service sector there too tyrannical and wanted an occupation with less human supervision. This desire for flexibility was a recurring theme and the adventure of working so far away from home also was a major motivating factor for many workers. One Indian courier explained to me that he had left his masters degree in India since "studying was also for getting work later", se he did not

see the point to keep doing it: “I wanted to shake myself, see the world” – he said with a big smile while also adding that he feels satisfied and will return to Hyderabad in Southern India once he is done here (Graham & Woodcock, 2019).

The selling of lifestyle and labour practices and economic gains in Hungary, however, sits uneasily with the actual conditions that many of my informants experienced after arriving in Budapest. Individual labour agents, labour agencies and other actors in the migration infrastructure of many migrant fleet workers appeal to them by touching on existing needs such as that of flexibility and adventure to persuade them. These actors in the migration infrastructure disseminate content through the digital infrastructure involved in this process that partly creates as well as reinforces some of these desires. This process contributes to the creation of a cheap and disposable workforce as it mobilizes and exploits anxieties stemming from the experience of precarity and deprivation.

The remaking of Wolt platform

If we are to understand the structural conditions of the precarisation of migrant fleet workers, it is necessary to see how this fits into the overall corporate strategy of Wolt platform. As mentioned in the first chapter, platforms are geared toward quick expansion to create market presence in new locations and deepen it in already existing markets. This process is fuelled by venture capital and cheap credit, however, investors start demanding results after a certain point as their “patience” was motivated by the promise of monopoly rents in the future and the era of cheap credit is largely over putting increased pressure on platforms to minimize losses (Vandaele, 2024). Wolt has never recorded a profitable year since its founding and the new labour regime involving fleet companies and migrant workers in Budapest – by far the biggest market for Wolt in the country – can be grasped as a strategy by the platform to cultivate a vulnerabilized and disciplinable part of the workforce that is ready to work long hours and face

barriers due to informational asymmetries, their legal status and the outsourcing of disciplining when it comes to withdrawing their labour.

Wolt has been able to adapt to consumer demand in the post-covid era with tighter labour markets while the changes to tax law also made the courier profession less desirable and the abundant pool of labour power seemed not to be available for the platform in this new conjuncture. Alternatively, the platform could have responded by raising rates and giving other concessions to couriers to satisfy consumer demand, however, this would have resulted in increased costs for the platform. The fleet system and its reliance on disciplinable migrant workforce in Budapest made it possible to avoid increasing rates and they even decreased in some cases according to the representatives of the Couriers' League. Migrant workers have several types of pressures as detailed in this chapter that compels them to work long hours and accept any order available while also having severe limitations on how they can demand better working conditions. The introduction of this segment of workers to the platform further fragments the overall workforce making it much harder to organise and represent them collectively vis-à-vis the platform and the intermediate actors involved (Vandaele, 2024). Thus, this remaking of the platform through the new labour regime involving migrant workers has temporarily solved the issues for capital that arise from the indeterminacy of labour without having to give concessions to workers.

The remaking of the labour management system of Wolt also has an indirect effect on the income opportunities of the competitor, Foodora's couriers as raising rates in their case would have weakened the platform's competitive position. While Foodora recorded a revenue of 18 billion forints in 2022 and 19 billion in 2023, Wolt managed to double its revenues going from 10 billion in 2022 to 20 billion in 2023 (*Wolt Delivery Magyarország Kft.*, 2025)
(*Delivery Hero Hungary Kft.*, 2025).

The fleet system was introduced in the autumn of 2022 and this rapid growth of revenue suggests a connection to the new labour management system although more research would be required to determine causality in this case.

Factors other than being a migrant can limit people to working through fleet companies as representatives of the Couriers' League Trade Union explained: if someone gets a prison sentence longer than 5 years, they cannot open a business for 10 years eliminating the self-employed courier option for them. Also, indebted individuals might also opt for this opportunity as they might be able to get their pay in cash meaning that the interest on the credit is not automatically deducted from their bank account. However, relying on migrant workers is an essential part of the strategy to acquire cheap and abundant pools of labour for platforms. While I talked to fleet workers with no migration background during my fieldwork to understand the system of fleet companies through different perspectives, it was beyond the scope of this research to meaningfully investigate their experience of this type of labour management as well.

Informational asymmetries and unequal access to knowledge

The legal status of fleet workers makes it possible for fleet companies to discipline them effectively and to push most of the costs associated with the labour process while having an employer-employee-like relationship with them. Their residence permit – both for guest workers and holders of individual work permits – is tied to their employment at the company, so the termination of their contact most likely results in them having to leave the country. They are reliant on the fleet company as well to spend the whole duration of their visa in the country: "I want to extend my visa for another year, but it depends on the fleet company whether I can" – a courier named Deepak detailed to me while he was waiting for an order at Corvin.

Their contracts with the fleet companies are work assignment contracts. This type of contract is meant to be used for temporary task to be completed, whereby two equal parties make an agreement about one party performing a certain task for the other. Employing someone

regularly through a work assignment contract is illegal as traditional employment entails a hierarchical relationship and more than just one specific task to be completed between parties. This means that they can be fired immediately without having to give any reason for doing so and they are not regulated by the Hungarian labour law and thus have no legal limit on the hours they can work. As an employee, they could legally work 48 hours a week at most and would have to receive overtime bonus for the 8 hours above 40, but working with a work assignment contract means that 70-80 hour a week is perfectly possible with no option for bonuses. If they are fired, they have to leave the country in six to eight days and can only apply for a new residence permit in their country of origin. The only option around this is applying for a new permit, however, it is highly uncertain whether they can get a new employer. In case fleet workers were employees, their employer would have to provide them equipment, however, fleet workers have to buy their own vehicles or rent it from the fleet company as well as smartphones and also take on the costs associated with the amortization of equipment. As couriers have no guaranteed sick leave in this labour regime, I met workers on several occasions who reported having fever, but being unable to spare more time for recovery. Furthermore, working through a work assignment contract also leaves no possibility for unionization leaving workers the only option of bargaining individually with the fleet companies. Only legal employees have access to collective representation under Hungarian labour law. Although the Couriers' League Trade Union has some contacts with fleet workers, they also explained to me that fleet companies explicitly prohibit their couriers to join the trade union in some cases. The legal grey zone created by the use of work assignment contracts was also alluded to by the representative of Wolt: she emphasized that they had started to partner up with fleet companies to allow entry to the workforce to those who want a "more employee-like construction".

This legal construction makes it possible for employers to reduce their obligations towards workers and increase the discretion that they possess over them, thereby making possible the

proliferation of precarious jobs in the country (before its abolition, the tax category, KATA mentioned in the previous chapter was another option for hidden employment practices). Thus, this legal option allows for fleet companies and Wolt to have tighter control in some cases over fleet workers and to make possible the input of migrant labour for the platform while keeping all the advantages of the traditional self-employed courier model that shifts costs on the individual worker.

The Vietnamese riders have an important difference compared to the rest stemming from the fact that they are employed through labour contracting companies. Guest workers – a.k.a. migrant workers employed by labour contracting companies – are provided accommodation by the labour contracting company. The Vietnamese riders were housed in the 10th district in Budapest from where the central parts of the city with most of the orders are easily accessible. According to the video detailing their lives, they lived in a warehouse-like accommodation facility with 10-15 people housed in one room. The rest of the couriers told me that they had a reduced rate per delivery compared to the rest since their housing was for free. Furthermore, control over the housing arrangements was also weaponized against them according to the Couriers' League Trade Union since they would be closed out of the housing unit at 6 a.m. and not let back until 10 p.m. Later they shortened this window to last from 9 a.m. to 9 p.m. due to public outroar caused by images circulating of Vietnamese riders sleeping rough on benches during the day on Facebook (Pun & Chris, 2007).

While couriers have to cover almost all the expenses that their working life entails, the promise of low costs and provisions are used by labour brokers to make the idea of working in Hungary seductive. Bashir worked in Dubai before coming to Hungary where he essentially made the same monthly income nearing 1000 euros. In Dubai, he got housing and food during working hours for free and was promised to get housing, internet, phone and a bike for free at the fleet company. However, these all turned out to be his expenses and therefore he has to spend half

of his income on these items. A general feeling of disappointment regarding costs of living was also common throughout the migrant workforce: people expected cheaper housing and groceries as well as frustration over the fact that the country did not have euros, but the more volatile domestic currency, forints.

Information asymmetry thus is a constitutive element of the labour regime of migrant fleet workers and contributes to the reproduction of this group of workers as vulnerable and disciplinable. This adds to the already existing layer of informational asymmetry between worker and platform that is fundamental to the labour process of digital labour platforms. The social disembededness of migrant workers entails that they do not have adequate knowledge about of labour conditions in the country as well as the rights they dispose of both as workers and third-country nationals. Their general isolation from the rest of local society means that they cannot easily access networks of information that could be useful for decreasing their dependence on their employers. These informational asymmetries make it possible for these workers to become expropriable by allowing the lengthening of the working day significantly for these workers (Fraser, 2016b).

The outsourcing of disciplining

Once I was having a conversation with a courier at Corvin and the shift system – that meant less flexibility, but also some guarantee of an expected income for couriers – had just been abolished. Frustration was a general sentiment amongst riders at the time since it was February and the weather was slowly getting better meaning that orders were decreasing compared to peak season. Many said that it makes no sense to talk to their fleet company about this change since they just point to Wolt: “The company does not explain to us why the new system was introduced, but only says that it was Wolt’s initiative” – a courier named Yusuf was explaining and seemed to have no hope that they could impact this decision.

While non-fleet couriers have to deal with the platform and its algorithmic management techniques, fleet workers face at least two types of "bosses": one is the platform that provides the digital infrastructure for measuring and coordinating the labour process and the other is the fleet company that acts like a more traditional manager organising the working life of couriers. The internal digital interface of fleet workers differs in one detail compared to the rest of the workforce: they do not see the amount of money that a delivery gets them when they accept and neither later. They might rely on their personal statistics displayed on the app to make rough guesses of how much renumeration they should receive for a given period, however, this is not exact. In some cases, couriers might suspect that they do not get all the money that should be given based on the average rates that a certain delivery for a certain distance gets them. However, it is hard to contest this and this increases the discretion that fleet companies possess over them. The black box of algorithm has one more layer that obscures for fleet workers and the discretion this allows for fleet companies increases the vulnerability and insecurity of workers (Cant, 2019).

Furthermore, the informational asymmetries inherently embedded in the structure of the platform are made greater between management and workers by the fact that it might take some time for fleet workers to understand the internal system of the fleet. A Bangladeshi courier called Kabir came asking for my help since he did not get paid for the month of January by his fleet company as he stayed home a couple days due to exhaustion and sickness and did not know about the deductions that fleet companies make when someone misses a shift (although the deductions could have been greater than necessary based on the system as it would have been almost impossible to collect so many penalties for a couple days that one ends up having their whole wage deducted). He was showing me a Whatsapp message saying "Boss, pay me pls, still haven't got the money for January" to which his boss responded by saying "How can

I pay you like this?" making reference to the fact that he has 200 000 forints (around 500 euros) in deductions.

When the shift system was abolished in February causing the vast majority of my informants to be dissatisfied, the fragmentation of disciplining was used to shift blame and to make it harder for couriers to protest the decision. People were dissatisfied and saw their chances of making reasonable money significantly drop, however, the fleet companies pointed to Wolt saying that the platform introduced the new system unilaterally. Since Wolt takes no responsibility for fleet workers, they cannot protest the platforms decision or make contact with them through any channel, thereby leaving them no space to voice these concerns. During our interview, a Wolt representative insisted that fleet companies are subcontractors of Wolt and therefore have complete autonomy over how they organise their internal system, however, this seems unlikely as the system is changed according to the labour needs of the platform. Furthermore, one manager from a fleet company also confirmed that it was a top-down decision that all fleet companies had to adopt to.

The costs associated with seasonality

Seasonality is important part of food delivery work. It was a recurring theme in our conversations as I started my fieldwork in January and ended it at the start of April, so the weather was increasingly getting better meaning fewer orders in general. Platforms plan their yearly operation around this change in consumer demand: they start giving out bonuses for couriers who invite new couriers in autumn and gradually increase it until December-January while these bonuses end around April. Although the efficiency of these bonuses is called into question by the representatives of the Couriers' Trade Union: many people claim it, but end up not delivering in the long run since the rates provided by the platforms are not desirable anymore (which is also why vulnerable migrant fleet workers were needed to ensure a pool of workers sufficient in size in the peak season). In the summer, the labour needs of platforms are

much more easily satisfied: not only is demand the lowest, but also many students work as couriers in the summer holidays. At the same time, fleet workers have to work 16 hours a day in the summer to make the same amount as they would be doing 12 hours a day in the winter according to Amir.

The shift system for fleet workers was abolished in February, which was exactly when I discovered spot at Corvin boulevard and decided that it would be the most fruitful place to concentrate my efforts on. When I was there for the second time, most people would be complaining about the change of system. One Pakistani guy named Bilal was sharing his frustration with me that there are not enough orders and a lot of couriers waiting to get these at the same time. A bit later an order appeared on his phone, but by the time he could accept it, it was gone: "I don't know how to make money like this" – he sighed. The earlier system entailed more rigid working hours since fleet workers had to reserve shifts and would face deductions if they were not online during the shift. At the same time, it also meant a more predictable stream of income as they would receive the hourly rate provided they hit the target of 2.1 deliveries per hour and 80 percent acceptance rate for orders during the shift.

While the new system meant more flexibility for fleet workers, it also resulted in the intensification of the labour process. Bashir explained to me that in the previous system, if he completed 26 orders in a 12-hour shift, he would receive at least 27500 forints (almost 70 euros), but now he has to do 35 deliveries to make the same amount now. Their fleet company tried to sell them the benefits of the new system by saying that no limit on the working hours meant that they could make more money, however, this did not seem to reassure most of the couriers. Although one courier I talked to shared the opinion of the fleet companies since he could work more than twelve hours a day in the new system. Furthermore, another rider also complained about the hard targets that had to be completed before: in his case, a significant difference compared to the rest of the workforce was the fact that he did not have to save money

or send it home to his family, which allowed him to work only five days a week and eight hours a day and to spend his income on travelling in Europe.

The platform's strategy to satisfy peak demand in the winter made it seemingly sensible to operate the shift system, thereby making sure that labour power was readily available and put to use in that period (Marx, 1990). However, the changing patterns of consumption that make this profession vulnerable to seasonality made it possible for the platform to push the risks associated with volatile demand onto workers by abolishing the shift system once peak season was over. At the time, this meant an overcrowded labour market for couriers who were competing for fewer orders without guarantees. This was only partly reversed when the fleet company that worked with Vietnamese riders saw its contract ended with Wolt, thus eliminating the potentially biggest group of couriers from the workforce. This change was a partial and temporary relief for the other couriers as suddenly, the number of available orders increased significantly, which meant that in the next weeks they would be going from one order to the next instead of just waiting around sitting on their thermal backpacks. How they understood the disappearance most of the Vietnamese and through that their own situation will be detailed in chapter 3.

Chapter three: Collective and individual strategies

“ We live like a family here you know, the six of us. So we have to talk about the issues as well when they come up” – Arhaan excused himself when he had to pick up the phone during our conversation. He laid out to me that they share a flat with five other Indian couriers and share much of their free time watching movies as well as reproductive responsibilities such as cooking. He pointed to his friend who makes the best chicken biryani and his friend had a proud smile on his face as he received the compliment.

Wolt employment practices that produce difference between couriers that leads to the fragmentation of the workforce are an important factor that makes it harder to organize these workers based on their collective interests. The flip side of the fragmentation of the workforce is the solidarities that form between couriers as they go about their working life and beyond. While the labour process coordinated by algorithms inherently isolates workers as well as it profits from and produces their social disembeddedness, I have seen in my field work that this tendency is not total and workers still find a way to find connections, share information and increase resource available to them. They also use these encounters to make sense of their working life and the pressures that it creates in their life.

While collective representation is not available for migrant fleet workers and their migration status makes their position vulnerable, they make use of the social networks to pursue collective or individual strategies aimed at improving their position and income perspectives. These strategies do not seem to threaten the overall structure of this labour regime since the fragmentation of this segment of the working class by capital and by capital-friendly labour regulations has successfully prevented collective organisation so far. Nevertheless, they provide a way for workers to make their working and reproductive life somewhat easier and also to benefit from alternative opportunities that might arise.

Fragmentations and solidarities

When I first started exploring the main site of my field at Corvin mall, I immediately noticed a division in the courier workforce present. One side of the entrance to the mall was occupied by a big group of Vietnamese workers and the rest of the couriers waited on the other side of the entrance where space was tighter, but bars for locking the bikes were available. The rest of the couriers were mainly Pakistanis, Bangladeshis and Indians, but also some couriers with different nationalities. These couriers would many times use their native tongue, but they also spoke English fairly well and mixed with one another. Mixing between nationalities was not common for newcomers as some Bangladeshis who arrived recently would only gather in groups with one another. However, I regularly witnessed more experienced couriers from different countries greet each other and keep company while waiting for orders. According to a Bangladeshi student called Abdullah, Pakistani, Bangladeshi and Indian couriers had a shared Whatsapp group with over 3000 members (although this number has to include student couriers, ex-couriers and also other people to add up). This meant that these fleet workers also had ties to students who came from the same country and through other fleet workers to students from elsewhere. Furthermore, I also witnessed them chatting to Hungarian couriers from time to time.

This shared space located where the mall's entrance meets the boulevard became the go-to spot for many couriers: some waited on their own and chose to be there primarily to benefit from the advantageous location for getting deliveries, but many could also be sure to see familiar faces once they returned from an order. This meeting point served as a counterforce to the generally isolating nature of the highly automated food delivery labour process. As a courier, one has their smartphone through which the app dictates the steps from accepting a delivery to making the drop at the customer, where the most human interaction would be a couple words exchanged in the restaurant and with the customer. At the meeting point, they could forge connections that are the basis of these networks that help them increase resources available to

them despite their precarious situation. It also helps to kill time between deliveries and have some banter: once Amir stealthily walked up to Bilal's thermal backpack and slid his phone into his back pocket. When Bilal was coming back, he started panicking and searched for the phone, only to realize that he had just been the victim of a prank to the amusement of the rest. Couriers would also share conversations about politics around here and I would be repeatedly asked about why the Hungarian government is so strict on migration when it seems to be in great in need of it.

These ties can also provide a safety net to fall back on. I met a Pakistani courier through Amir once, his name was Zakariya. He had left his fleet company and applied for a job in a kitchen and was waiting for his new residence permit to be issued. According to Hungarian law, third-country nationals with individual work permits can apply for a new one in Hungary and be issued a temporary permit while they are waiting. To my surprise, I saw him a couple weeks later in the Wolt uniform delivering on a bike. I assumed he had gone back to his fleet company, but it turned out he was still waiting for his residence permit to be issued and got the account of another courier to be able to make some money while he was between jobs. He had to look for non-legal streams of income to weather the waiting period for the new permit. While this is the only example I have encountered in the field for sharing of accounts, it does seem to reveal that it is somewhat indifferent for the fleet companies and Wolt who does the labour as long as it is a disciplinable body.

Another space for making connections is the household. My interlocutors had to ensure their own housing, which made it possible for them to forge close ties to other couriers. As Arhaan explained at the start of this chapter, this provided some type of support to them that could function as a family away from home and made it possible to spread the costs of housing and share reproductive responsibilities and to provide a space where they can spend their limited leisure time in the company of others. Bashir and Deepak met at a company housing unit –

which costs significantly more than available rooms in Budapest – and decided to team up to find a shared flat with others, which allowed them to make use of the shared living space and reduce their costs of living through personal connections. A Pakistani student mentioned to me that he started making deliveries once he made friends with fleet workers sharing a flat next to him who made it clear that this was an occupation fit for a student lifestyle. These encounters are made easier by the fact that most delivery workers find accommodation in relatively cheaper parts of the inner districts. While these spaces offer socialization and support for riders and reduce a sense of isolation, it also has to be said that the existence of communication technologies makes it possible for them to connect to their families through video chat. This is type of connection is present in the life of many on a daily basis and gives access to the people that most of them end up enduring this job for. While it could be argued that these human connections are what makes this isolating labour process for socially disembedded workers more bearable and thus ensures their reproduction without extra costs for capital, it would also be misleading to downplay the significance of these and the potential they hold for more effectively representing their own interests in this labour regime.

The solidarities that formed among my interlocutors also entailed that some groups of workers were not included in these. The other main group of migrant workers, Vietnamese seemed to be much more isolated as they did not speak English and were exclusively working in the same company as other Vietnamese, thus sharing only accommodation with their co-patriots. I also had limited contact with them compared to the rest of migrant fleet workers, so I would not be able to write about their perception of the labour regime and the rest of the workforce. The rest of the couriers saw them as a separate group and would many times distinguish themselves from the Vietnamese. In the early days of my research when the shift system had just been abolished with few orders to go around, Arhaan complained about the Vietnamese saying that there was too much manpower because of them. He added that it had been much easier a year

ago when they were not present in such huge numbers. Amir also joked about their competences when detailing that five new Vietnamese riders at his fleet company were fired after a week since "they do not know how to work, they don't speak the [English] language". Furthermore, it was also mentioned in several conversations that Vietnamese couriers get a reduced rate per delivery since their housing is provided for free by their labour contracting company. I could not verify this detail, however, it certainly attests to the fascination this difference created in other fleet workers who tried to make sense of the luxury of free housing.

As mentioned in the second chapter, most of Vietnamese workforce disappeared in mid-February as the fleet company's contract with Wolt was ended resulting in more available orders for the rest of the workforce. Some of the riders speculated whether they were striking since their income opportunities deteriorated since the abolition of the shift system. While this tuned out not to be true based on the reporting done one Vietnamese courier, it seems that the possibility of strike captured the imagination of fleet workers in the given circumstances where more stable income perspectives were unilaterally abolished by the platform.

About two weeks following the Vietnamese workers disappearance, I was walking up to my usual spot at Corvin mall and could see from a distance that a lot of couriers were gathering and talking between each other enthusiastically. It turned that the former Vietnamese couriers brought their electronic bikes to sell to the rest to get money for groceries as they had no income at the time. The rest of couriers were bargaining with them and buying the bikes, especially since three Pakistani couriers living together had just got their bikes stolen the night before. I was asking the Vietnamese where they were planning to go and their reply was to find another job to Hungary. However, Amir was told that they would go somewhere else in the EU making use of many Vietnamese diaspora communities in the bloc.

Individual strategies

One day in March, I bumped into Kabir on his way to the mall. He had a fever, but felt the pressure to be outside since he had not received his payments for January and February as I mentioned in the previous chapter as well. He missed some days due to the weather and sickness in January and ended up receiving deductions, which was why his fleet manager told him he could not be paid. Later, he did not receive payment for February either, even though the shift system had been abolished by this time, so deductions were not available as disciplinary measures for fleet companies. "Do you think I can change my fleet company?" – he was asking me out of frustration. I promised to ask around about the feasibility of it and learned through Zakariya that it could be done by contacting the lawyers of another fleet. He went to tell his fleet manager later that he would leave if he did not get his payment. He then managed to receive his pay for January and was promised to get it for February as well on the payday in April.

While the solidarities that form provide important resource to couriers, individual strategies for improving one's position or to escape precarity are also utilized by couriers. This can take the form of individual bargaining, although this individual bargaining also tends to be based on existing networks for sharing knowledge such as in in the case of Kabir. Other practices could be aimed at maximizing the profitability of one's time.

Several couriers I met were wearing Foodora uniform that made me confused once I learned that they were fleet workers since Foodora did not have partnerships with fleet companies. These couriers were multi-apping meaning that they worked through their fleet account for Wolt, but also tried to reserve shifts when possible at Foodora. As Abdullah having had experience about both platforms explained to me, Foodora had higher rates per delivery, but had a shift system where those with the best statistics and most hours worked would get the best shifts. If fleet workers could reserve shifts at Foodora, they could make most of their time

due to the higher rates this platform offers. While the individual work permit does tie them to their fleet company, they could work as independent contractors on the side. Registering as an independent contractor, however, requires knowledge of the local administrative procedure, so sharing knowledge about this inside the courier community facilitates this process.

Also, it was common amongst couriers to contemplate or go forward with leaving. Amir detailed during one of our conversations that some Bangladeshi workers had freshly started working at his fleet company and immediately left for Spain or Italy as they were deceived by the "seller of dreams", the labour agents. Where they can move inside the EU also largely depends on existing diaspora networks.

Amir himself expressed a similar desire. "I have no future" – he was telling me during one of our early encounters. "Being a courier at this age [late 20s] leaves you with no future". He had originally applied for student visa together with his wife, but his request was denied since he had already had a master's degree in electronics and the immigration office did not believe his intention was to study in the country. This entailed that he could only apply for an individual work permit and food delivery job seemed to be an easy entry in Budapest. He tried applying for jobs that could be compatible with his qualifications, but was denied each time despite having close to twenty interviews. The lack of future prospects and the rise of the far right made him contemplate leaving Europe for the Middle-East or Canada.

Bashir also was planning to leave the country and this topic came up in several of our conversations. As I detailed in the previous chapter, he was disillusioned by the working conditions after his first two months in the country as he was promised free housing and equipment for work when he made his application in Dubai. The abolition of the shift system made him increasingly frustrated as he had to spend longer hours working to make the same amount of money he did when shifts were still available. When I first talked to him, he mentioned he might return to Dubai or Bangladesh if the overall situation does not improve.

Later, his plan was to apply for kitchen jobs or delivery in Germany and Finland. “I got rejected from Germany, because they wanted to do an interview in person and I cannot go” – he added while he was still waiting for any reply from Finland. Thus, transnational migration appears in the field both as a way to escape the job in search of better conditions, but also merely as an inspiration that helps coping as a migrant fleet worker in other cases.

An additional strategy that can be identified is one mentioned by Amir. In his fleet company, recruitment would be done by labour agents who happened to be fleet workers coming from a certain country, in his case first Pakistan – which channel was terminated because of alleged document falsification for workers – and then Bangladesh. These couriers made use of the social networks available to them in their home country and became an important actor in the migration infrastructure of fleet workers. This enables them to upgrade and pocket huge sums of money in the process, thereby contributing to the exploitation of fleet workers and to their reproduction as a vulnerable group.

The obstacles to organising

An important question to be addressed regarding the situation of these workers is why they do not end up organising collectively despite the fact that they have a shared space for discussions and informal channels of communication such as the Whatsapp group used by Pakistani, Bangladeshi and Indian couriers. Furthermore, the fact that there were rumours spreading about the Vietnamese workers striking once they had disappeared from the streets was an indication that idea of some sort of push back against the abolition of the shift system captured the imagination of couriers. The general frustration that characterized most fleet workers I talked to could have been fertile ground for such collective action.

One reason has to do with their legal status both as non-EU citizens and as fleet workers. Their residence permit allows them to work in the country for two years that can be extended by one additional year and the validity of their visa is dependent upon their employment at the specific

company which they applied to. This entails that their stay is temporary strengthening the feeling that their work as couriers is only a fleeting chapter in their life that can make it seem pointless to start organising. Also, their very livelihood as foreign workers that many invested heavily in could be threatened if they make demands or strike as their contracts can be terminated, in which case they are most likely forced to leave the country. The work assignment contracts that tie them to fleet companies can be terminated immediately without reasons given for doing so, which makes the threat of deportation much more realistic. Furthermore, work assignment contracts do not entitle individuals for collective representation, thereby outlawing legal options for organising.

Additionally, the outsourcing of labour management obscures power relations and allows for different actors in the labour regime to shift the blame, thereby reducing workers ability to confront capital since the labour process is based on layers of exploitation and the precarity induced by transnational migratory patterns. When the shift system was introduced, couriers complained to fleet companies who replied that the change was Wolt's decision and they had no power to impact that as Yusuf explained to me shortly after the change took place. However, Wolt has legally no connection to these workers as fleet companies are subcontractors of the platform and the subcontractors contract these couriers leaving no formal channel open for these workers to target Wolt. The fragmentation of disciplining confuses migrant workers and makes it easier for the platform and fleet companies to deny responsibility.

When it comes to talking about labour migration, it is also important to understand what is left at home when someone migrates. The most common answer as to why they were enduring this job was to help their families back home and a general sentiment among many couriers was to keep enduring the hustle to maximize their earnings while they are there. What is purposefully abandoned can also be impactful. Some couriers expressed a desire for flexibility appreciated the option to clock in anytime. This feature of the labour regime seemed to be effective in

creating consent from some of the couriers. One Bangladeshi courier precisely praised the system for this characteristic: " I can clock in any time and there is no supervisor breathing down my neck" – he explained as he was also sharing his negative experiences about office jobs. The ethos of flexibility was also used by fleet companies to create consent for the new system without shifts: they emphasized how couriers could make more this way by having no limit on their working hours as Bashir explained to me, although he was not convinced by the argument.

As I detailed in the previous section, couriers tend to opt for individual strategies for advancing their interests or income perspectives. Notably, exit seems to me to be quite impactful when it comes to collective organising on behalf of migrant fleet workers. Workers leaving – while not ideal for fleet companies – can be seen as a safety valve that lets out pressure since the dissatisfaction that could be targeted at the platform and fleet companies is instead put to use to search for different opportunities. In an indirect way, the individual strategy used by fleet workers who become labour brokers also impact the prospects of organising: the huge fees they charge for organising their migration puts fleet workers under extra pressure to endure since they have a lot more to lose this way.

Conclusion

Throughout my research, I attempted to understand how a new labour regime emerged in the case of Wolt platform that relied on the outsourcing of management to subcontractors and on precarious migrant labour. A growing share of the workforce has come to consist of workers from the Global South and the emergence of this labour regime meant that new models aimed at managing and shifting costs onto workers have emerged. Disciplining of workers is fragmented and partly outsourced to fleet companies, thereby introducing new disciplinary measures besides those arising from algorithmic management techniques. The recruitment of migrant workers through fleet companies makes it possible to introduce a vulnerable and expropriable group into the platform's workforce. These migrant fleet workers lack social embeddedness, face additional information asymmetries compared to the rest of the workforce and have an insecure legal status both as workers and immigrants while the migration infrastructure they use causes them to become indebted. These factors immobilize migrant fleet workers and make it possible for platform capital to extract more labour from them while keeping the likelihood of push back from these workers low. This new labour regime has impacted the rest of the Wolt workforce. The integration of a highly exploitable group entailed that the platform could respond to growing demand without having to increase the rates for individual orders to ensure the supply of labour just as the costs of living was increasing significantly. Thus, the labour regime involving migrant workers contributed to the cheapening of the overall workforce. The details of the labour regime are then unilaterally modified by the platform based on its conjunctural needs of labour increasing precarity for fleet workers. The costs associated with the labour process and social reproduction are pushed onto migrant fleet workers who are subject to a fragmented system of disciplining that obscures relations of power and makes it easier for the platform and its subcontractors to evade responsibility. Despite the

generally fragmenting nature of Wolt employment practices and the semi-automated labour process, solidarities form between migrant fleet workers and with other couriers that enable them to increase the resources available to them and maximize their income opportunities even if these solidarities exclude other groups. Couriers also employ individual strategies to secure their position and enhance the opportunities that mobile labour offers in Budapest.

On a more abstract level, one could say that capital aims to fragment the working and introduce a cheap and disciplinable group to the workforce as it seeks to cut costs since platform capital is under pressure from investors and creditors to start producing profits especially as the era of cheap credit is over. These migrant workers are a good fit since the structural conditions of transnational labour migration produces them as immobilized subjects lacking social embeddedness, thereby as subjects who are more exploitable and disciplinable. The precarious situation of these workers entails that their ability for collective representation and thus for getting concessions from capital is significantly decreased compared to non-marked workers, so the emergence of this new labour regime can also be understood as a way for platforms to undermine the conditions of collective resistance.

However, the limitations of the research need to be acknowledged. The three months I dedicated to studying this emerging labour regime only allowed me to get a glimpse of evolving relations that constitute it. The extremely limited free time my subjects dispose of due to the labour discipline and intensity they are subject to and their general isolation from the rest of local society entails that more longer-term research is needed to establish deeper connections and understand how individual and collective trajectories evolve over time. Thus, I have not been able to access the spaces of social reproduction of these workers, which could be a valuable addition to our current understanding of this labour regime. A longer research period would also allow for committing to working as a fleet worker, thereby getting more direct information about the internal workings of these companies. Furthermore, my positionality also limited what

I could gain access to in the field, therefore it would be essential to conduct research about these workers with people familiar with their languages and cultural backgrounds.

Longer-term research could make it possible to follow the trajectory of migrant fleet workers: this could include investigating the social context at the sending countries where workers depart from and where they most likely return eventually. It could also offer insight into the new destinations certain couriers opt for in search of better opportunities. Our understanding of how this labour regime is constituted as well as the motivations behind entering it and leaving it could become much richer if the scope of the research is broadened in geographical and thus social scope. Additionally, if we are to understand in its entirety how Wolt has been remade, it would be important to also include non-migrant fleet workers in the study since migration background is not the only factor that can produce disciplinable workers. This can also enrich our knowledge about the potential ways digital labour platforms might try to restructure their workforce in the future as challenges are mounted to force concessions from them.

And what is next? I have no delusions about the fact that dominant political and economic interests are against such changes, but it is also important to identify measures that could make life more bearable and dignified for these workers and indirectly to others as well. Illegal hidden employment practices have to be addressed and employee status granted to fleet workers – and the same option to other couriers – and access should be granted to longer-term residence permit as well as the option of family reunification. Information asymmetries have to be addressed by giving workers control over their own data and providing them with transparent information about the concrete details of the work process in question. Furthermore, Wolt should legally be made accountable for fleet workers even if they are employed by subcontractors. This could decrease precarity for these workers and make it easier for the whole workforce to organise collectively against the platform. This also entails seeing migrant workers as possessing

commonality with other groups in the way they are made vulnerable, which makes it possible visible that their interests also converge.

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