

BACKGROUND PAPER

Mapping Platform Work in Hungary

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About the project

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1. Characteristics of platform work

1.1. Features of platform work

Calculating from and reaggregating the results of the 2022 ETUI Internet and Platform Work Survey (IPWS), the great majority of Hungarian platform workers are on-location (67.9%) and 32.1% are online platform workers. By utilised categories of the survey the distribution is the following: clickwork remote platform work 14.3%, professional remote platform work, 17.9%, transport platform work 39.3%, delivery platform work 10.7%, on-location platform work 14.3%, other platform work 3.6%.¹

Both global and local platform companies operate in Hungary. Multinational platforms are more common in transportation, food delivery and micro-work, while local platforms are mainly established in local personal and household services, care services, education and hospitality services.² In online platform work UpWork is increasingly dominant in terms of the number of worker users.³ In personal transportation, Bolt dominates the market, but intercity transportation is covered by more local platforms like Oszkár. In the last decade, there has been significant turnover, acquisitions and capitalization among (local) platform companies.⁴

¹ Agnieszka Piasna and Jan Drahokoupil. "Digital labour in Central and Eastern Europe: Evidence from the ETUI Internet and Platform Work Survey" (ETUI: Working Paper 12, 2019).

https://papers.ssrn.com/sol3/papers.cfm?abstract_id=3500717 p. 21. Hungary participated in an experimental labour force survey of the Eurostat in 2022, covering the following categories of platform work: Transport, Good selling, Taxi, Medical care, Renting, Creating content, Other, Online support, IT, Cleaning- handiwork, Tutorial- teaching, Child and elderly care, Translation. Data are however available only in aggregated form for the 17 countries (16 EU member states and 1 EFTA country). See: Eurostat, "Employment statistics - digital platform workers", *Eurostat, 2022). https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Employment_statistics_-_digital_platform_workers.

² Jan Drahokoupil, Marta Kahancová and Tibor T. Meszmann. "Falling through the cracks: Gig economy and platform work in Central and Eastern Europe," in *Routledge Handbook of the Gig Economy* ed. Immanuel Ness, . London: Routledge, 2023. <https://doi.org/10.4324/9781003161875>.

³ Branka Anđelković, Tanja Jakobi et al. . *Gigmetar Region*, (Centar za istraživanje javnih politika: May 2024), <http://gigmetar.publicpolicy.rs/region-2024-1/>.

⁴ For example, RunBnB a local platform specialised in cleaning services for short term rental apartments seized to exist in 2023. Simultaneously, a similar platform, Rendi.hu expanded. Foodpanda purchased the local Netpincér in 2014, but Foodpanda was bought by Delivery Hero in 2018 and appears as Foodora from mid 2023, Taxify entered the personal service market after Uber stayed away in 2016. After significant capital investments, Taxify was renamed Bolt. Uber reappeared in Budapest in 2024. In total, capital driven concentration occurred, especially among on-location platforms. See: Mándó Milán. "Netpincérből Foodpanda. A 20 éves Netpincér sztori" *Minner*, September 14, 2021, <https://minner.hu/netpincerbol-foodpanda-a-20-eves-netpincer-sztori/> For transport see: Tibor T. Meszmann. "Industrial Relations and Social Dialogue in the Age of Collaborative Economy: National Report Hungary". (CELSI Research Report no.27, December 2018) https://celsi.sk/media/research_reports/RR27.pdf.

1.2. Prevalence of platform work

Pre-Covid surveys in 2017 and 2018 found that Hungary ranked significantly below the EU average for both intensity and relevance of platform work, in all domains of main, secondary, marginal or sporadic activity.⁵ Online platform work has remained comparatively less significant even during the pandemic, both in the extreme segments of high-value-added professional work and in the low segment of clickwork.⁶ Online platform work was comparatively less common in Hungary than in the Western Balkans. In 2024, there were only 49 platform workers per 100,000 inhabitants, a steep decline of 13.6% compared to the previous year.⁷ During the pandemic, among EU member states, Hungary ranked low in terms of intensity of platform work and generated income, but it ranked relatively high in the area of delivery, but also transport platform work, especially among those working on a regular monthly basis.⁸

1.3. Platform worker demographics

In terms of social composition, in 2024 Hungarian online platform workers were predominantly male (64.8%).⁹ In 2019, according to the first ETUI IPWS survey, women

⁵ The authors of the survey defined intensity and relevance as an estimate combining information on income and hours worked, or more abstractly as regularity, time intensity and income. See Urzi Brancati, Cesira Pesole, Annarosa and Enrique Fernández-Macías. *New evidence on platform workers in Europe. Results from the second COLLEEM survey*, (Luxembourg: Publications Office of the European Union, 2020), p.11 and 16

⁶ Agnieszka Piasna, Wouter Zwysen and Jan Drahokoupil. „The platform economy in Europe. Results from the second ETUI Internet and Platform Work Survey.” (ETUI, 2022)

⁷ Anđelković, Jakobi et al. *Gigmetar Region*. Throughout the region, the trend was that of contraction. In Hungary besides unfavorable labour market trends (demographic changes, labor shortages, emigration) the changes in the regulation, especially higher taxation of small entrepreneurs led to a steep, about 30% decrease of active small entrepreneurs, and quite possibly also contributed to the decline of those engaged in online platform work. For the impact on taxation rules on the decrease of small entrepreneurs see Dobos Zoltán, "Megharmadolta a katasokat a szigorítás, íme a pontos szám" *MFOR*, January 20, 2023, <https://mfor.hu/cikkek/makro/megharmadolta-a-katasokat-a-szigoritas-ime-a-pontos-szam.html>.

⁸ Piasna et al „The platform economy in Europe..”. Compared to many EU countries, during Covid-19 the Hungarian government barely or did not at all introduce any measures to protect free professionals (e.g. artists) but it introduced a reduction of value added tax for home deliveries of food, from 27 to mere 5%. With a market and labor demand thus expanding, and incomes for some disappearing, many were forced to take up delivery work. On the measures see e.g. Barbora Holubova, “DEFEN-CE: Social Dialogue in Defence of Vulnerable Groups in Post-COVID-19 Labour Markets” (CELSI: Working paper on EU-wide analysis of the Defence - database data, 2023), https://celsi.sk/media/datasource/D2.2_Working_paper_on_the_EU-wide_analysis_of_the_defence_data_database_FINAL.pdf.

⁹ Anđelković, Jakobi et al “Gigmetar”.

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represented the vast majority in the category of other freelance services and tasks, including childcare and tutoring, while men were slightly overrepresented in higher-paying creative and IT work, as well as among platform workers generally.¹⁰ On average, Hungarian platform workers are slightly younger than the population that reported no platform work experience; during the pandemic, the gap was the smallest among EU Member States (40.2 vs. 42.8 years).¹¹

In 2018, the share of foreign-born workers among platform workers who performed platform work as a secondary occupation was quite high (9.5%), but their share among those who performed platform work as a main occupation was low.¹² Students coming from “third countries” are very present among platform workers, and they can legally work part-time. During the pandemic, the share of foreign-born platform workers in Hungary was relatively high, especially among those with second jobs in the transport and delivery segments, both in comparison with other EU member states and with the general presence of foreign-born workers in the Hungarian labor market. In contrast, foreign-born platform workers were less likely to be engaged in professional work and other freelance activities.¹³

¹⁰ Piasna, and Drahokoupil, “Digital labour in central and eastern Europe”.

¹¹ Piasna et al. „The platform economy in Europe.”.

¹² Brancati et al. “*New evidence on platform workers*”, 27.

¹³ Piasna et al. “The platform economy in Europe”.

2. Driving factors

As I explained elsewhere, income maximization strategies and a significant increase in the cost of living/indebtedness are the main drivers of popularity on the labor supply side, coupled with the increased presence of capital-intensive global platforms and local start-ups. Overall, platform companies have opened up a global space for the valorization of semi-regulated casual service work, and appeared as an innovation of tourism-related services.¹⁴ Over time, in line with informed stakeholders' judgment, platform work in Hungary emerged and established itself as an innovative segment of traditional service subsectors,

such as passenger transport, domestic work, cleaning, accommodation or delivery services, but also sex work. These sectors have traditionally had a higher degree of tolerated informality, with self-employed small entrepreneurs or natural persons working on the basis of civil law service contracts (*megbízási szerződés*) as service providers. Intermediaries, including fleet companies (*flotta cég*) or student cooperatives (*diákszövetkezet*), play an important role in the process. They efficiently recruit and employ workers on small, typically service-based contracts for work for the largest on-site platform sectors, especially for food delivery. Local platform workers considered income-maximizing individual entrepreneurship appropriate because it was perceived as generating a high degree of autonomy and as an efficient source of (additional) income. Intermediaries provide easy access to platform-based employment, especially for labor market outsiders such as youth or foreign students.¹⁵

There is a lack of initiative on the part of the authorities to address the high level of informalization and differentiate small entre-preneurship from bogus self-employment.

¹⁴ Informants reported the decisive impact of the 2009-2012 crisis on both tourism demand and the new, cheaper or more efficient supply side of tourism-related (micro) services.

¹⁵ Meszmann. "Industrial Relations", Dražokoupil et. al. "Falling through the cracks", On sporadic and insufficient regulation of economically dependent work and its reasons see Tamás Gyulavári. "Trap of the Past: Why Economically Dependent Work is not Regulated in the Member States of Eastern Europe". *European Labour Law Journal* 5, no. 3-4, (2014): 267-78.

3. Country-specific impact: benefits and challenges

While online platform work has remained comparatively marginal, on-site platform work has had the greatest impact on some traditional sectors, innovating but also putting pressure on tourism-related services such as accommodation, personal transport or food delivery.¹⁶ Earlier, some traditional employers' organizations in tourism-related services monitored and recorded the growth of the platform economy and platform work. In private taxi services, especially during and after the pandemic, the overall market share of platform-based companies increased, despite attempts by traditional taxi companies to increasingly introduce software applications into their operations.¹⁷

Companies and entrepreneurs who play an intermediary role in sourcing labor for platform companies create quick access to jobs, especially for labor market outsiders, and larger, more accessible avenues for the valorization of casual work.¹⁸ There is a lack of initiative on the part of the authorities to address the high level of informalization and differentiate small entrepreneurship from bogus self-employment. As Drahokoupil et al. summarize, platform work has found its way into the border zone between precarious formal employment status and the gray informal economy. The working conditions of platform workers are typically unfavorable, and their income and social security are low. As a result, platform work is only sustainable for workers on a temporary basis, as a secondary or marginal activity, or in combination with other forms of employment or status that provide workers with sufficient social protection.¹⁹

¹⁶ On the one hand, such innovation made tourism-related services more globally competitive, especially in attracting and adjusting to the needs of younger generations of tourists faster, thus perhaps even expanding the market for tourism-related services. On the other hand, on-site platform work created pressure and a regulatory challenge by creating unfair competition. See: Meszmann "Industrial Relations.."

¹⁷ By 2022 the total revenue of Bolt was the highest among all taxi organising companies, and totalled almost 30%, with tendencies to increase even further. Its largest local non-platform based competitor made a contract with Uber in 2024, thus allowing it to reenter the largest Hungarian market of Budapest. See: Barna Kovács. "A Boltnek akarnak odacsapni" – ellenségből a taxis piac egyik császárává válhat a visszatérő Uber" March 19, 2024, <https://24.hu/belfold/2024/03/19/uber-budapest-visszateres-bolt-taxi/>.; Bucsky Péter. "Két cég letarolta a meggyötört budapesti taxipiacot" G7 January 9, 2024, <https://g7.hu/kozelet/20240109/ket-ceg-letarolta-a-meggyotort-budapesti-taxipiacot/>.

¹⁸ Meszmann, Tibor T. "Industrial Relation".

¹⁹ Drahokoupil, et al "Falling through the Cracks".

4. Current national regulatory landscape and EU criteria

4.1. Classification of platform work

Platform work is not legally defined and is not officially classified as a separate economic sector. Platform work or platform-based work (*platform alapú munka*) is most commonly used in a lively discourse among Hungarian legal scholars, especially due to the recognition of the need to comply with EU-level regulation.²⁰ Platform work is governed either by internal terms and conditions of platform companies or by intermediated informal or semi-formal practices (e.g. via fleet companies). Intermediaries utilize the existing legal framework and use a variety of existing casual forms of service-based employment, or other contractual arrangements outside or marginally within the scope of the labor code to contract workers, while making separate contracts with platform companies.²¹ Regulation has remained a key issue in subsectors where traditional employers have insisted on fair competition but have lost their battles for stricter regulation, partly due to the vested

²⁰ Hungarian legal scholars have developed an intense discourse and exchange surrounding the issue of platform work and platform workers in the contexts of ongoing digitalisation, sharing and platform economy and its articulation in the legal system. See especially: Gyulavári Tamás. "A foglalkoztatás bizonytalan formáinak szabályozása : Élet a munkaviszonyon túl" (Academic Doctoral Thesis, Hungarian Academy of Sciences, 2024), <https://disszertacio.ppke.hu/id/eprint/575/>; Mátyás Zimmer and Dániel Gera. "Közösségi gazdaság és munkajog – új foglalkoztatási forma a láthatáron?" *Jogászvilág*, April 13, 2016, <https://jogaszvilag.hu/rovatok/cegvilag/kozossegi-gazdasag-es-munkajog-uj-foglalkoztatasi-forma-a-lathataron/>; Tamás Gyulavári. "Internetes munka a magyar jogban – Tiltás helyett szabályozás?" *Pro Futuro*, 3:, (2018), pp 83-95, <https://doi.org/10.26521/Profuturo/2018/3/2903>; Tamás Gyulavári: Hakni gazdaság a láthatáron: Az internetes munka fogalma és sajátosságai. *Iustum Aequum Salutare* 1: 2019. pp 25-51.; Gábor Kártyás, Rita Répáczki and Gábor Takács. "A munkajog digitalizálása. A munkajog hozzáalkalmazása a digitális munkakörnyezethez és a változó munkavállalói kompetenciákhoz". Kutatási zárótanulmány, (Budapest: Közösen a Jövő Munkahelyeiért Alapítvány, 2016).; Erika Kovács. "Regulatory Techniques for 'Virtual Workers'". *Hungarian Labour Law E-Journal*, Vol. 4(2). 2017, pp 1-15, http://hllj.hu/letolt/2017_2_a/A_01_EKovacs_hllj_2017_2.pdf; Attila Kun. "A digitalizáció kihívásai a munkajogban." in: *Egyes modern technológiák etikai, jogi és szabályozási kihívásai*, ed. Árpád Homicskó (ed.). (Budapest: Károlyi Gáspár Egyetem, 2018), 119-138, http://www.kre.hu/ajk/images/doc4/dokumentumok/Egyes_modern_techologiak_etikai_jogi_es_szabalyozasi_kihivasai.pdf; Ildikó Rácz. "Munkavállaló vagy nem munkavállaló? : A gig-economy főbb munkajogi dilemmái." *Pécsi Munkajogi Közlemények*, 10, no. 1, (2017), 82–97, journals.lib.pte.hu/index.php/pmjk/article/view/6133; Rácz Ildikó. "A digitalizáció hatása a munkajog egyes alapintézményeire" (PhD Dissertation, Budapest: Károlyi Gáspár Református Egyetem Állam- és Jogtudományi Doktori Iskola, 2021, https://real-phd.mtak.hu/964/1/Racz_Ildiko_Disszertacio_watermark.pdf.

²¹ For example, an intermediary (fleet company) contracts workers on service-based or minor contracts (sometimes formally for 4 but actually for 12 hours of work), whose work is directed by the platform company's algorithm, but these workers get payment from the intermediary. Drahoukoupil, et al. "Falling through the Cracks..."

interests of powerful business actors.²² Local platform workers favored individual entrepreneurship over regular employment especially because it required a relatively low fixed monthly tax and thus secured significantly higher net income.²³ The problem for local individual entrepreneurs is that regulations change rather frequently and unfavorably, resulting in lower net incomes and/or increased administrative burdens.²⁴ Platform workers are, at best, service providers whose economic activity is only partially covered by the Labor Code. This is the case, for example, of members of student cooperatives, whose (hourly) wage cannot be lower than the mandatory annually set minimum wage.

4.2. Court cases

Platform work or platform-based work is most commonly used in a lively discourse among Hungarian legal scholars, especially due to the recognition of the need to comply with EU-level regulation.

In 2018, a platform worker filed a lawsuit against a food delivery platform company, seeking a declaration that he was an employee of the company, working 40 hours per week for a gross monthly base salary. In its counterclaim, the company sought dismissal of the lawsuit, arguing that the parties did not intend to create an employment relationship when they entered into the contract. In the first instance, the court ruled in favor of the company, but in the second instance, the court found that an employment relationship existed between the parties. At the final turn of events in 2023, the Hungarian

²² The major regulatory battle concerned personal transport taxi services. For an overview see: OECD, "Taxi, ride-sourcing and ride-sharing services - Note by Hungary". Working Party No. 2 on Competition and Regulation, May 9 2018, [https://one.oecd.org/document/DAF/COMP/WP2/WD\(2018\)6/en/pdf](https://one.oecd.org/document/DAF/COMP/WP2/WD(2018)6/en/pdf).

²³ Introduced in 2013, until 2022, the popular form of small entrepreneurship was the special itemised tax for small enterprises (kisadózók tételes adója – KATA). It eliminated a large number of taxes for a fix monthly tax, introduced a very simple administration, and made starting the business very simple, with flexible opt-in and opt-out possibilities. Until May 2022, nearly 12% of all active on the labor market were KATA small entrepreneurs, a fraction of which were also platform workers. Budapesti Kereskedelmi és Iparkamara „Kisadózó vállalkozások tételes adója - KATA”, <https://bkik.hu/kisadozo-vallalkozasok-teteles-adoja-kata>, Accessed March 2, 2025

²⁴ The most important recent example is the significant amendments to the taxation of KATA small entrepreneurs. The amendments negatively affected most free professionals, also food delivery workers, but taxi drivers successfully lobbied against it. See e.g. Csiki Gergely. "Így változik a kata: benyújtotta a módosítást a kormány." *Portfolio*, July 11, 2022. <https://www.portfolio.hu/uzlet/20220711/igy-valtozik-a-kata-benyujtotta-a-modositast-a-kormany-555555>.

Supreme Court ruled conservatively and in favor of the company,²⁵ thus cementing the established business model of exploiting platform work in Hungary.²⁶

4.3. Union representation for platform workers

Platform workers are, at best, self-organized in proxy union associations. For example, taxi drivers are represented by a quasi-union, the National Trade Union (*Nemzeti Szakszervezet*), and food delivery workers by the Food Deliverers' League (*Futárok Ligája*). Both organizations monitor and lobby for or against regulatory changes, representing the interests of platform workers as individual entrepreneurs. The position of some of the "union" leaders is quite precarious: the leaders of the food couriers remain anonymous because the platform companies can terminate the contracts with any courier at any time without giving any reason.²⁷

²⁵ The second ruling - as summarized by Gyulavári and Sipka "stated an undefined employment relationship with a basic pay (at minimum wage). The second instance court relied on the same factual conditions, legal provisions, case law and resulting employment tests like the first instance decision, however, it came to the opposite conclusion. The judgment was based on the substantial features of work conditions and stated the existence of personal subordination and control, as well as mutual obligation of the parties, putting aside the absence of fixed working time by the employer." In contrast the third, final Curia (Hungarian supreme court) "overturned the second instance court judgment and approved the first instance decision with a similar reasoning. The Curia went through the classification marks (employment tests) in accordance with the former two judgments and the Guidelines, and stated the lack of the attributes of employment concerning these tests. At the same time, the Curia neglected the alternative path offered by the sophisticated and progressive second-instance decision". Gyulavári Tamás and Péter Sipka. "The first Hungarian platform work judgement: 'self-employment'", May 28, 2024 : <https://global-workplace-law-and-policy.kluwerlawonline.com/2024/05/28/the-first-hungarian-platform-work-judgmentself-employment/>.

²⁶ The court case garnered great attention and debate among legal scholars See esp. Zoltán Petrovics. "The First Judgment on Platform Work in Hungary." *Revue de Droit Comparé Du Travail et de La Sécurité Sociale*, vol. 4, 1 (2024),. 298–302, <https://doi.org/10.4000/12z7a>; Tamás Gyulavári. "The First Platform Work Judgment in Central and Eastern Europe." *European Labour Law Journal*, 15, no. 4, (2024): pp. 931–938, <https://doi.org/10.1177/20319525241260869>; Patrik Szabó, "A platformalapú foglalkoztatás minősítésével kapcsolatos hazai bírósági ítéletek bemutatása, különös tekintettel a Kúria Mfv.VIII.10.091/2023/7. számú ítéletére », *Munkajog*, no. 2, 2024, <https://munkajogilap.hu/a-platformalapu-foglalkoztatasi-minositesevel-kapcsolatos-hazai-birosagi-iteletek-bemutatasa-kulonos-tekintettel-a-kuria-mfv-viii-10-091-2023-7-szamu-iteletere/>; Ildikó Rácz-Antal. "Kutatási összefoglaló, A platformalapú munkavégzés munkakörülményei, munkavállalói és szociális jogok kapcsolata", *Onlineplatformok.hu*, Accessed March 2, 2025.; György Nadas and Márton Leó Zaccaria. "Munkaviszony-e a platform munkavégzés?: A Kúria első platform munka-ítéletének kritikai elemzése". *Jogtud. közlöny*. 79 No. 6, 2024. 283-294, <https://doi.org/10.59851/jk.79.06.2>.

²⁷ Sarolta Székely. „Megfojtott futártársadalom: ma már csak a túlélésről szól a munka napi 12 órában, heti hat-hét napon.” 444 <https://444.hu/2024/09/26/megfojtott-futartarsadalom-ma-mar-csak-a-tulelesrol-szol-a-munka-napi-12-oraban-heti-hat-het-napon>.

4.4. Current policy debates and EU Level

Policy debate occurs during legislative or regulatory changes affecting the conditions of economic activities in specific sectors or the taxation rules of small business forms and professions. In these debates, representatives of affected platform workers also participate.²⁸ On a more general level, legal scholars point to the dangers of unregulated platform work; some urge policy coordination, including social dialogue, institutional preparation, implementation of directives and EU-level regulation beyond the formal minimum.²⁹ The relevant Hungarian authorities rejected the first version of the Platform Work Directive³⁰ and have not yet expressed any significant attention or concern regarding the transposition of the Platform Work Directive and its deadline.

²⁸ Sarolta Székely, “‘Az állammal van baj, hogy ezt megengedi’ – kiberultak a futárok”, *444*, March 22, 2024, <https://444.hu/2024/03/22/az-allammal-van-baj-hogy-ezt-megengedi-kiberultak-a-futarok>.

²⁹ Rác-Antal, *Ibid.*

³⁰ Théo Bourgery-Gonse, “Member states deal heavy blow to platform work deal”. *Euractiv*, December 22, 2023 <https://www.euractiv.com/section/economy-jobs/news/member-states-deal-heavy-blow-to-platform-work-deal/>.

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