

PPG

PRAGMATIC POLICY GROUP

Poland App-Based Delivery Work in 2025

Measuring the impact of Courier Partner reclassification on local commerce, job opportunities and consumer prices.

About this Report

Pragmatic Policy Group (PPG) was commissioned by Wolt to independently estimate the impact on courier partners in Poland if they are reclassified as traditional employees, as well as the economic consequences for Polish merchants and consumers.

Pragmatic Policy Group

PPG is an independent economic research agency which models the impact on the economy of various legislative and regulatory scenarios.

PPG is particularly focused on the unintended consequences of government policies for the most vulnerable members of the community.

We use advanced analytical techniques and industry experience to forecast the impact of regulations, share evidence-based insights and help inform strategic decisions.

About the Author

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1 Introduction

In the past few years, app-based delivery in Poland has experienced rapid growth, with a significant rise in the number of workers and small businesses leveraging digital platforms to boost their income and preserve their flexibility. While estimates vary widely, it's likely that at least **666,000** people in Poland rely on flexible work through app-based platforms[1], and we expect this number to grow substantially in the coming years.

As the European Union implements its Platform Work Directive—a framework for regulating app-based work—we believe it is timely to measure the economic consequences of a country like Poland choosing to forcibly reclassify app-based delivery workers ('Courier Partners') to become traditional employees (from their current status as independent contractors). We employ advanced quantitative techniques to estimate the economic impact.

Our economic modeling shows that forcibly reclassifying Courier Partners as traditional employees will negatively impact Polish consumers, local commerce and workers.





[1] ETUI, 2022

We identify three main negative effects—specifically:

1 Consumer prices will increase by **9–12%**—disproportionately impacting lower-income households.

2 Higher prices will reduce customer demand for local commerce by **184–534 million zł** (in annual revenue losses), especially for SMEs which are the backbone of the Polish economy and which many Polish families depend on for their livelihood.

3 **39–41,000** earning opportunities will be eliminated (**75–78%** of those currently available) and this will reduce annual workers' earnings by **24–71 million zł**. In particular:

- There will be fewer flexible working opportunities for people who can't commit to the inflexible nature of traditional employment, and
- Platforms will be forced to consolidate available working hours among a smaller number of workers.



The strong expansion of flexible earnings opportunities has been—and will continue to be—particularly valuable for people who otherwise face obstacles in accessing the traditional labor market, like Ukrainian refugees who are fleeing conflict. In fact, around **45%** of Courier Partners are not from Poland[2], which hosts over **992,000** actively registered Ukrainian refugees. Many of these refugees[3]—as well as Polish citizens—turn to independent work as a vital source of day-to-day income.

Our economic analysis builds on the findings of two high-quality surveys on the attitudes of Courier Partners and local businesses toward app-based platforms. Copenhagen Economics conducted an extensive survey of Courier Partners in Poland, and Norstat surveyed the views of local businesses that rely on app-based platforms to sell their goods.

Some **56%** of Courier Partners report delivering on app-based platforms to avoid unemployment[4], while **66%** of Courier Partners say they would have to reduce their living costs if flexible work were not available. Clearly, flexibility is a lifeline for hundreds of thousands of people in the Polish labour market.

Courier Partners strongly value flexibility and do not want to—or are unable to—work as traditional employees. At least **8 in 10** Courier Partners say they prefer working on app-based delivery platforms (as opposed to other earnings opportunities, including traditional employment)[5]. Some **76%** say that if they lost the flexibility to choose their own hours, tasks, vehicles, or routes due to legislation, they would consider stopping app-based delivery work. Courier Partners estimate that their earnings would, on average, decrease by around **20%** if they could not do app-based delivery work.[6]

Equally important, the app-based economy has created enormous opportunities for local merchants—especially small businesses—to expand and scale their operations. For one platform, small businesses represent **86%** of all merchants (retailers and restaurant owners) using app-based delivery in Europe, a share which grows to **97%** when we include medium-sized enterprises. Meanwhile, nearly **3 in 4** merchants surveyed say that reaching new customers is one of the top benefits of using app-based delivery platforms.[7]

The following sections of this report explain how we estimate the economic impacts of forced reclassification on Polish consumers, local businesses and workers.

[2]Copenhagen Economics. 2024. Survey of Courier Partners.
[3]Refugees from Ukraine recorded in Poland, retrieved on March 2025 from UNHCR, Government. This figure reflects the number of Ukrainian citizens and their families with active registration, who have been assigned a PESEL identification under The Special Law on Assistance to Citizens of Ukraine.
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[4]Copenhagen Economics. 2024. Survey of Courier Partners.
[5]Copenhagen Economics. 2024. Survey of Courier Partners.
[6]Copenhagen Economics. 2024. Survey of Courier Partners.
[7]Norstat, 2023, Survey of Merchant Partners.

2 Impact of Reclassification on Consumer Prices and Demand

Price Rises for Consumers

Due to the repercussions associated with an employment model (discussed further in section 4), we estimate that prices customers pay for delivery services will rise between **9–12%.**[8]

When the prices of app-based delivery services increase, consumers will use those services less often and instead prefer to buy cheaper alternative goods and services that are not impacted by those price increases.

The extent to which an increase in prices affects how much consumers choose to buy is referred to as price-elasticity of demand. Our research peers studying California's legislation to reclassify gig workers[9] assumed that app-based rideshare and delivery services have a price-elasticity of demand equal to -1.2, meaning that for every 1% increase in prices, customers will order 1.2% fewer services. This assumption was also used by economists who supported employment-like protections for rideshare workers in New York City.[10]

We estimate a range of outcomes, including the more conservative assumption that customers might have a lower price elasticity of demand equal to -0.55, based on Beacon Economics' study in Massachusetts[11]. This would mean that for every 1% increase in prices, consumers will order 0.55% less. Consumers don't adjust their spending as much in this more conservative scenario, so the impact on demand and work opportunities will be smaller.



9-12%

Rise in consumer prices
Prices rise by **9–12%** for customers of app-based delivery.

[8]The cost of reclassification is calculated as:

$$\frac{\text{Cost after regulation - Cost before regulation}}{\text{Cost before regulation}} = \frac{[(1+20.48\%)\,x] - [(40\%\,*(1+20.48\%)\,x)+(60\%*x)]}{[(40\%*(1+20.48\%)\,x) + (60\%*x)]} \approx 11.54\%$$

Our research peers studying California (see next page) assumed companies would pass on 100% of their increased cost to customers. We have chosen to be conservative and consider a lower bound of 75% cost pass-through in our base case, and a 100% cost pass-through in our downside case.

[9]D Lewin, W Hamm, M Kim, Berkeley Research Group, Analysis of driver jobs if gig economy companies must reclassify drivers as employees rather than independent contractors: May 2020.

[10]J Parrott and M Reich, Report for the New York City Taxi and Limousine Commission, An Earnings Standard for New York City's App-based Drivers: Economic Analysis and Policy Assessment: July 2018

[11]T Osman, Beacon Economics, How many app-based jobs would be lost by converting rideshare and food delivery drivers from independent contractors into employees in the Commonwealth of Massachusetts?: February 2022

We multiply the projected consumer price increase of **9–12%** by the price elasticity of demand of between **-0.55 and -1.2** to estimate a **5–14%** decline in customer demand for app-based delivery services.

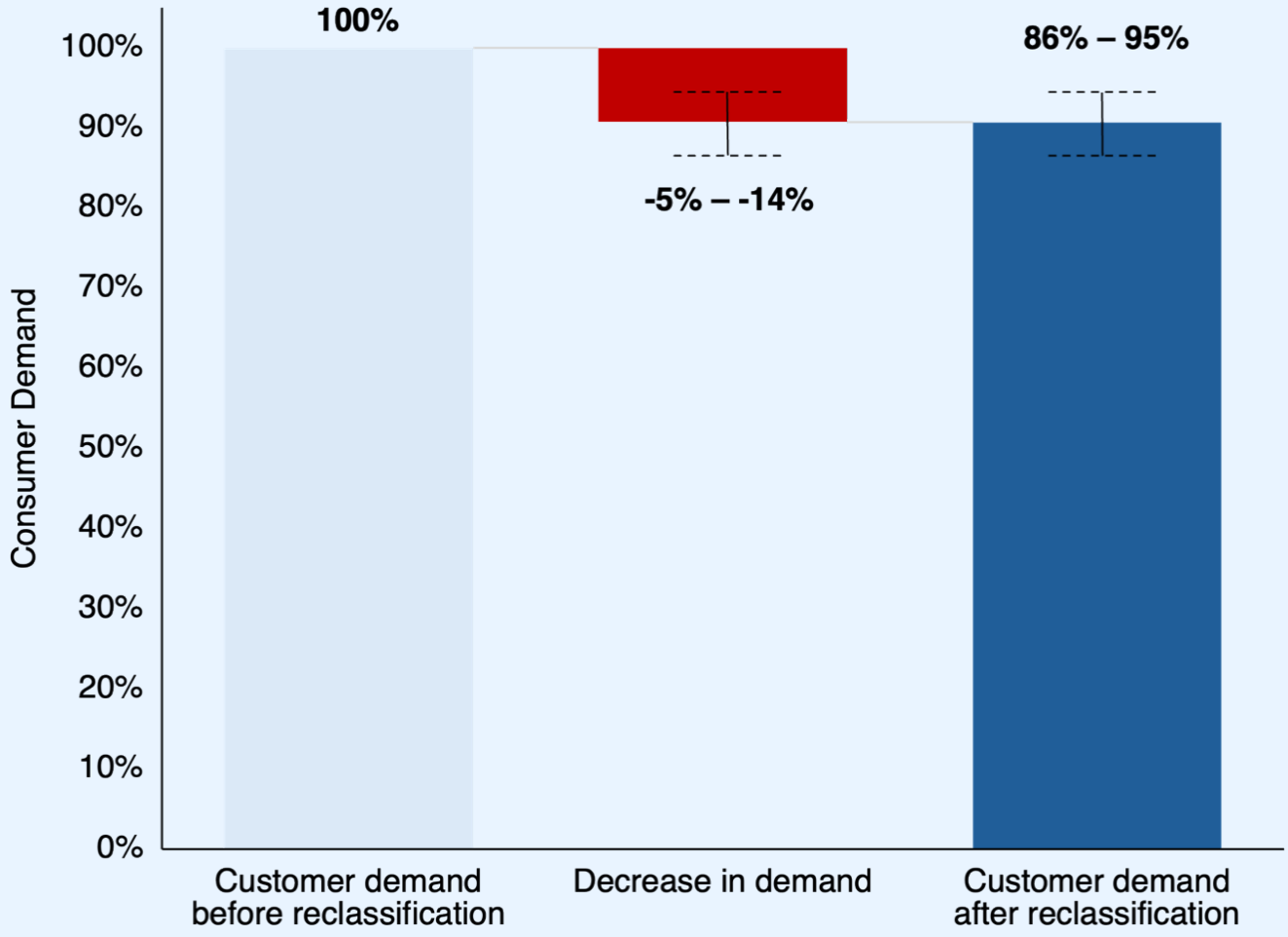
» 5-14%

Lower consumer demand for app-based delivery services

We project a fall of 5-14% in consumer demand for app-based delivery services due to large price increases for consumers.

This decline in demand represents the reduction in orders that local merchants—predominantly small and medium-sized businesses—can expect following a reclassification of independent app-based workers to traditional employees.

Figure 1. Consumer demand declines by 5–14%



3 Merchants Lose Business

Norstat's survey finds that **97%** of respondents in Europe—such as retailers and restaurant owners—are small and medium size enterprises. In fact, **87%** of merchants have only **1 or 2 locations** for their business. These merchants rely heavily on app-based delivery to reach new customers, increase their revenues and compete with large ecommerce platforms.[12]

Using industry data, we estimate that over **1 million** orders are placed weekly on app-based delivery platforms in Poland. Almost **91%** of these orders go to restaurants, with the remaining **9%** going to retail stores. The total annual revenue generated from these orders by merchants amounts to over **3,800 million zł**, with an average order value for restaurants of **67 zł** and for retail stores of **97 zł.**

Assuming an average annual growth rate of **7.1%**[13] over the next five years for the app-based delivery industry in Poland, annual revenues for merchants are likely to exceed **5,400 million zł** by 2030.[14]

However, reclassification leads to a decline in consumer demand of **5–14%**, representing an annual revenue decline of **184–534 million zł** for merchants in 2025. By 2030, merchants' annual revenues will decline by **250–750 million zł** as a result of reclassifying Courier Partners from independent contractors to employees.[15]

Merchant losses will translate into a loss of tax revenue for the Polish government. Using the conservative assumption that all merchants are small taxpayers paying a reduced tax rate[16], we estimate that annual tax revenue will fall by **17** to **48 million zł** in 2025. By 2030, annual tax losses will amount to **23 to 67 million zł.**

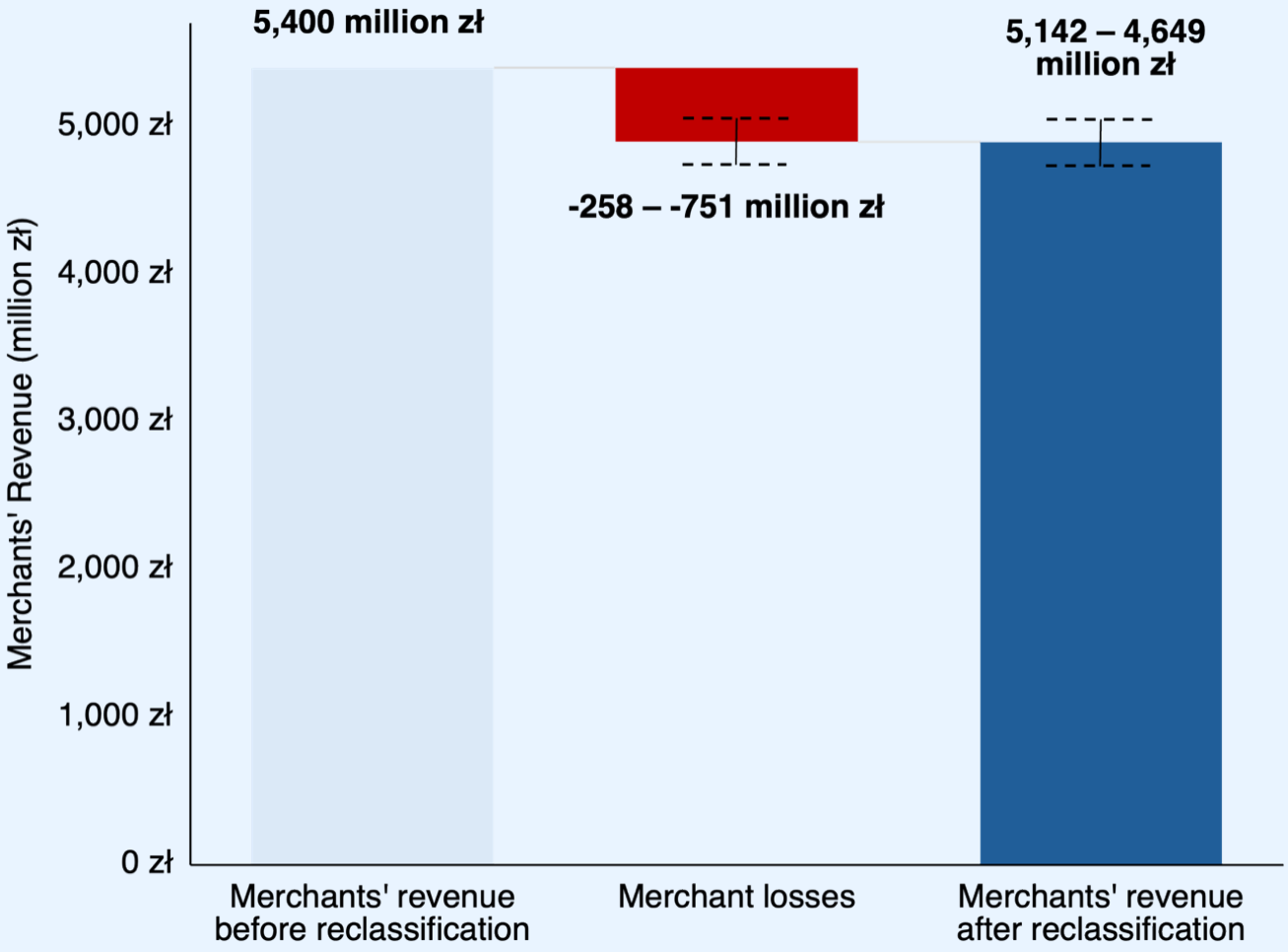
Merchants lose business



By 2030, annual merchant revenues will fall by **250–750 million zł**

[12]McKinsey, Retail's need for speed: Unlocking value in omnichannel delivery, September 8, 2021
[13]Compound annual growth rate (CAGR), projected by Statista.
[14]Projected Revenue = 3,840 million zł * (1 + CAGR) ^ 5
[15]Projected Drop = Projected Revenue – [(Base Decline * (1 + CAGR)^5)], where Base Decline is 184 million zł and 534 million zł.
[16]Since 97% of merchants relying on app-based delivery platforms are SMEs, we conservatively assume merchants pay the lower tax rate of 9% applicable to small taxpayers, compared to the standard corporate income tax rate of 19% in Poland.

Figure 2. Merchants will lose annual revenue of up to 750 million zł by 2030





4 Decline in Worker Hours and Earnings

Courier Partners choose app-based work because they value the flexibility it provides to come and go as they please, turn down delivery orders they don't want to do, and overall work when, where and for how long they want, while working for multiple apps at the same time. Courier Partners value 'being their own boss', never having to ask approval for vacation or sick leave, and the ability to work flexibly around other commitments like caring for a loved one, working another job, or pursuing their education or passion.

We focus on the amount of 'engaged time' that Courier Partners spend working on app-based platforms. 'Engaged time' means the time spent actively making a delivery to a customer or while en route to pick up a delivery from a merchant. There are two reasons why we believe that the number of hours a worker is 'engaged' in a task provides a more accurate picture of their time committed to flexible work than if we were to capture all time that a worker is logged in to any app.

First, **24%** of Courier Partners say they have multiple delivery apps open at the same time to choose their preferred delivery (and many are logged into multiple apps simultaneously)[17], so we need to avoid double-counting.

Second, many app-based workers use the time they are online with a delivery app open, but not engaged in a task, to fulfil other obligations, e.g., nearly **one-third** of Courier Partners say they use online time (while not engaged in a task) to complete other work, like answering emails or taking phone calls. Additionally, around **40%** of Courier Partners say they read, listen to music or podcasts, or watch TV while they are online on the platform but not completing a task.

Courier Partners are managed via independent companies ('fleets'), who make arms-length commercial arrangements with delivery platforms. Fleets contribute to the social security system (Zaklad Ubezpieczen Spolecznych, ZUS) on behalf of Courier Partners, provided they work enough hours to earn consistently. For those workers who do not meet the minimum hours threshold, an employment model would mean that platforms would contribute a further **20.48%** of gross compensation for benefits.[18]

Our analysis of industry and public data shows that fleets are already making ZUS contributions on behalf of nearly **40%** of Courier Partners in Poland, while over **60%** are working a smaller number of hours, likely just to earn some 'extra cash', and therefore do not currently qualify for ZUS contributions. Some **58%** of Courier

[17]Copenhagen Economics. 2024. Survey of Courier Partners

[18]PwC World Tax Summaries, Poland. https://taxsummaries.pwc.com/poland/individual/other-taxes

Partners do this work as a 'side hustle'[19] and many already have benefits through their other full-time or part-time jobs.

We find that Courier Partners, on average, make around **37 zł** after expenses[20] for every hour they actively work, which is higher than the average hourly wage of **35 zł** for other equivalent work[21]. When app-based delivery companies receive fewer orders, workers will have fewer hours to work and will earn less.

Based on our analysis of industry data in Poland, we estimate that app-based delivery workers currently work over **267,000 hours** per week in total across the industry. When customer demand for app-based delivery falls by 5–14%, this would lead to a corresponding decline of **13–37,000 hours** per week that are available to be worked in the app-based delivery industry in Poland.



FEWER WEEKLY HOURS AVAILABLE

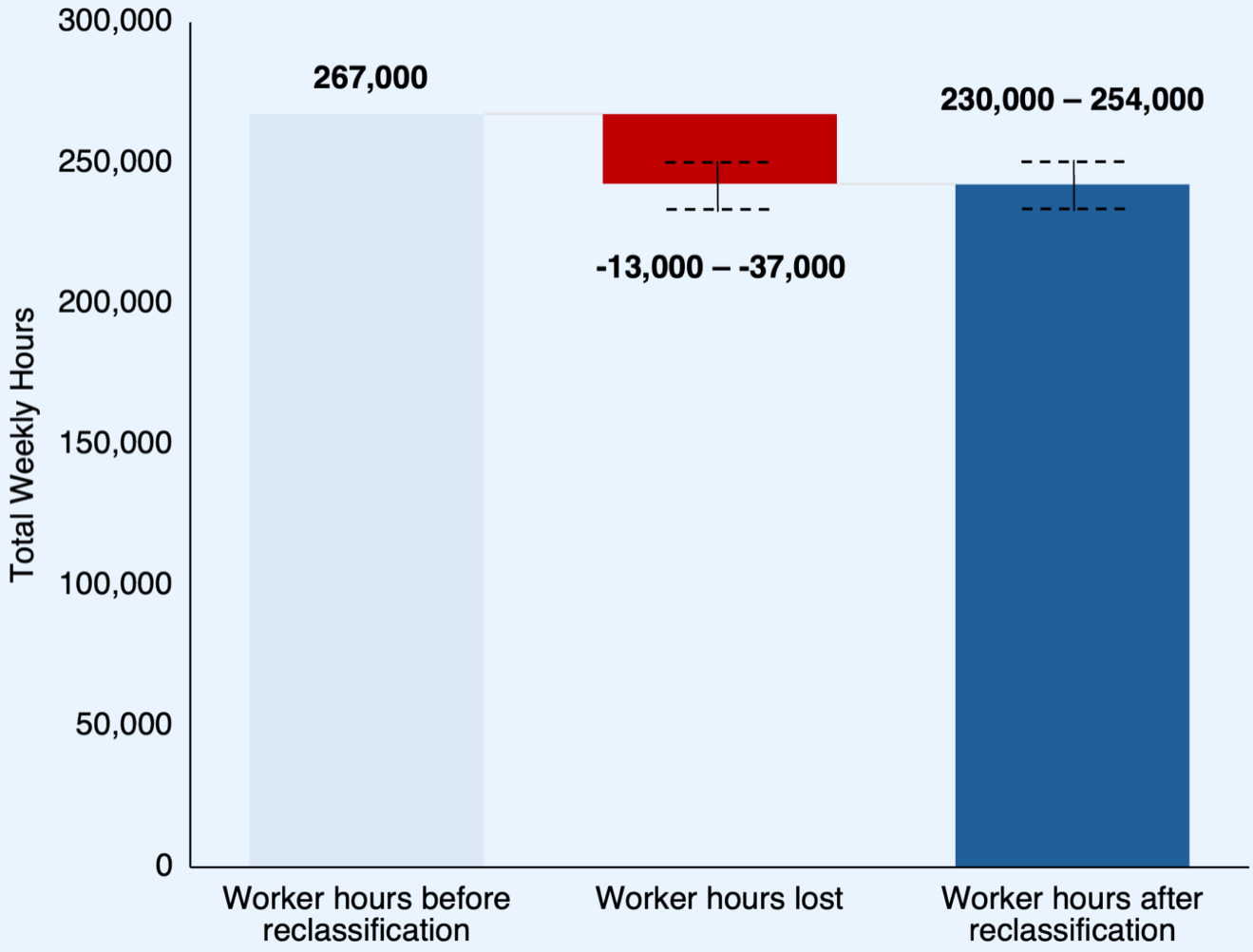
Total available work falls by 13–37,000 hours per week.

[19]Copenhagen Economics. 2024. Survey of Courier Partners

[20]Cornell University authors found that app-based workers' expenses average 10% of their gross earnings. L Hyman, et. al (2020). Platform driving in Seattle.

[21]E Svilenok, Average salary in Poland per hour and per month 2024.

Figure 3. Decline of 13–37,000 hours available for workers to work each week



When work hours are lost, worker earnings decline

A reduction of 5–14% in hours worked causes a corresponding decline in worker earnings.

At the average hourly wage of 37 zł (net of expenses), a decline of 13–37,000 weekly hours over 52 weeks in the year would mean a reduction in annual workers' earnings of between **24 and 71 million zł** for app-based delivery workers in Poland (net of expenses).

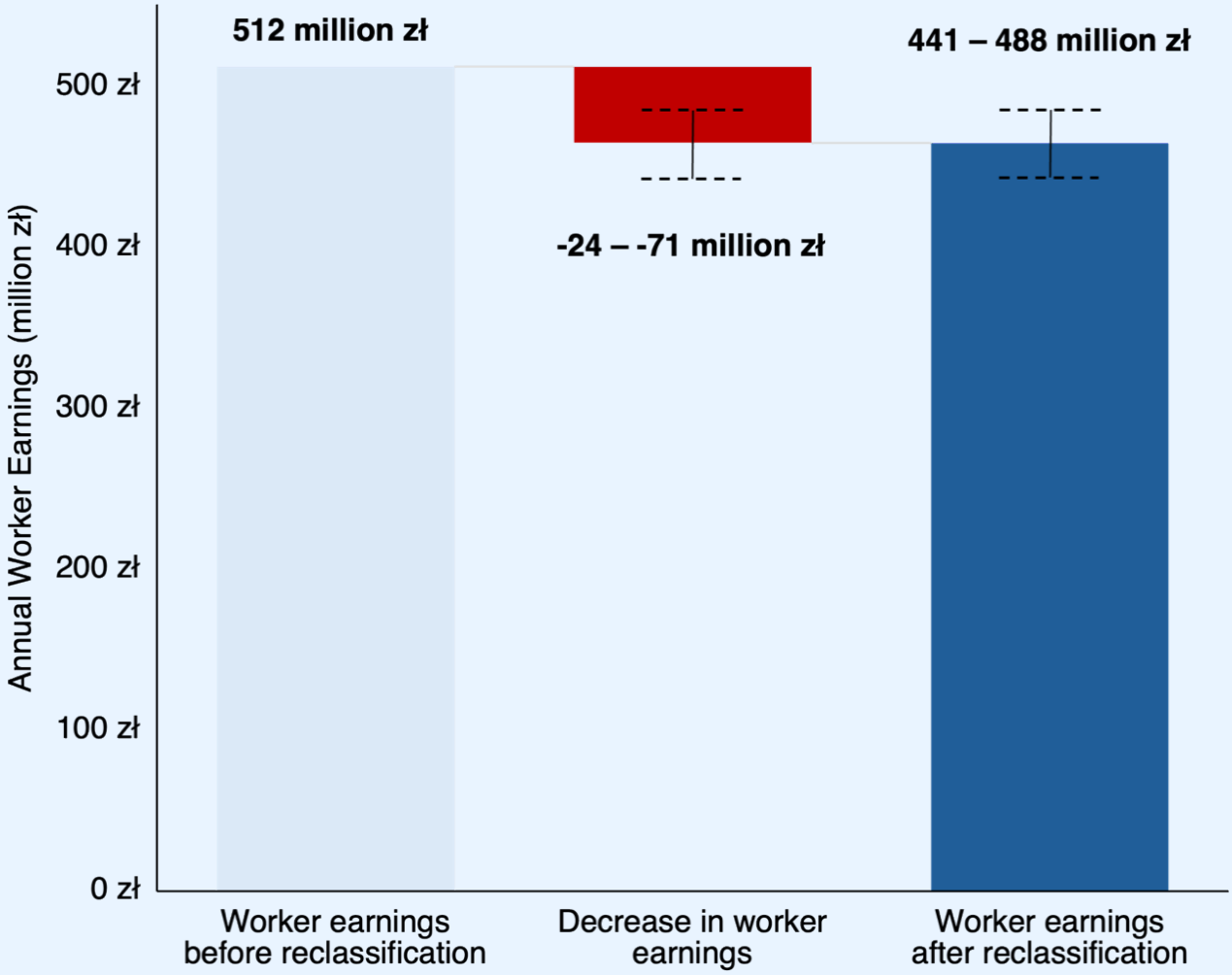
The loss in workers' earnings will decrease their spending, and therefore impact tax revenue. Assuming the standard VAT rate only (and conservatively not accounting for losses in personal income tax revenues), we estimate that annual tax revenues will decline by **6 million zł – 16 million zł** due to worker income losses.

Reduction in annual worker earnings



We estimate a reduction in annual workers earnings of between **24** and **71 million zł** (net of expenses).

Figure 4. Up to 71 million zł in worker earnings lost annually (net of expenses)



5 Fewer Earnings Opportunities

An overwhelming majority of Courier Partners depend on the flexibility of being an independent contractor—which allows them to work when, where, and for how long they want—and cannot commit to the rigid working schedule of being a traditional employee. Some **76%** say that if they lost the flexibility to choose their own hours, tasks, vehicles, or routes due to legislation, they would consider stopping delivering on app-based platforms.

The reclassification of app-based delivery workers has significant consequences for the earnings opportunities available to Polish citizens and Ukrainian refugees who rely on access to app-based delivery platforms to work flexibly and earn income.

Currently, we estimate that there are over **52,000** earnings opportunities available with app-based delivery platforms in Poland, based on our estimate of the total number of engaged hours worked each week across the industry, divided by the average number of engaged hours that workers currently choose to work (roughly 5 hours).

We model the impact of reclassification on earnings opportunities via **two channels:**

Initial loss due to lower demand

When prices rise, customers respond by lowering their demand for app-based delivery services, leading to fewer hours of work available for workers.

Our model suggests that weekly hours available for app-based workers will fall by **13–37,000** hours if workers are reclassified as employees. If app-based workers who are retained could continue to work around **5 hours** of engaged time per week, there would be a loss of **2,500 to 7,200** earnings opportunities, which means a loss of **5–14%** of current earnings opportunities due to lower customer demand alone.

Secondary loss due to fixed schedules

Reclassifying app-based delivery workers as employees would take away the flexibility that enables them to earn money on their own terms. **77%** of Courier Partners agree that app-based delivery work gives them the freedom to schedule their work around other activities (e.g. hobbies, travel, exercise or studies, etc.). **81%** of Courier Partners say the flexibility to decide how many or how few hours to work in any given week is a benefit they could not get from other earnings opportunities.

However, should Poland reclassify app-based delivery workers as employees, we expect that the companies will need to begin controlling workers' schedules and introduce performance management measures. It would no longer make economic sense for the companies to allow those workers to work just a small number of hours, to start and stop work whenever they feel like it, to choose which tasks they want to accept and reject, or to choose not to work at all while they are still being paid.

Currently, there is no minimum number of hours workers are required to work, and most delivery workers actually choose to work fewer than **5 hours** of engaged time per week. We expect that, as employees, app-based delivery workers would be required to work a minimum number of hours per week[22].

We assume companies will need to require every employee to work either **20 or 40 hours**[23] per week—approximating part-time and full-time roles, respectively. This assumption is more conservative than our research peers in California (cited above) who assume that rideshare and delivery companies would require all employees to work **40 hours**[24] per week.

When the lower number of hours available to work are consolidated into half part-time jobs and half full-time jobs, the number of opportunities to earn falls further by a total of **39–41,000** (including the impact of lower customer demand). This corresponds to a **75–78%** decline in the number of workers who can earn on app-based delivery platforms.

Loss of earnings opportunities

39–41,000 app-based delivery earnings opportunities will be lost...

...representing a loss of **75–78%** of current earnings opportunities.

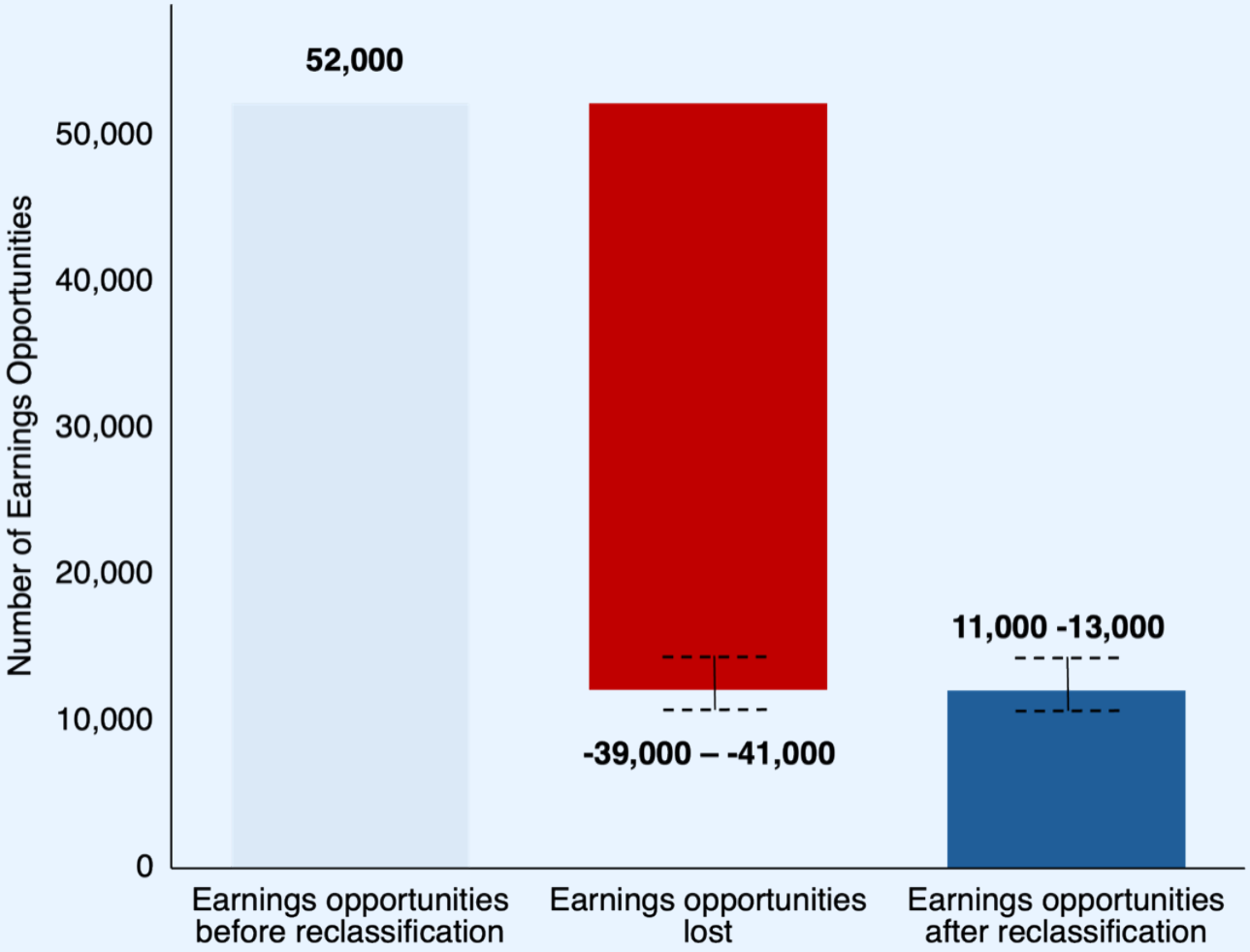


[22]PPG analysis on industry data

[23]We assume, based on previous research studies, that 'engaged time' represents around 75% of total time that app-based workers are signed in to an app.

[24]Converted from 'engaged time' to total time signed-in to the app.

Figure 5. Loss of 75–78% of earnings opportunities



The main groups of workers impacted will be those who depend on the flexibility of app-based work to fit with their lives – like students, parents of small children, or Ukrainian refugees who cannot work as traditional employees and rely on independent Courier Partner roles to support themselves and their families.

Courier Partners resoundingly say that they want to keep their independence:

85% **say that new laws should not force them to change their status from independent contractor to employee against their will;**

85% **say that lawmakers should ensure self-employed platform workers are free to choose when to work, which tasks to accept, and to work for any other company;**

73% **say they would consider no longer delivering on app-based platforms if they lose the freedom to choose which days and times they work.**[25]

[25]Copenhagen Economics Survey of Courier Partners

6 Appendix: Methodology

Our modelling approach builds on the methodologies set out by Beacon Economics (2022) – which studied the impact of reclassifying app-based rideshare and delivery workers in Massachusetts, in the United States – and Berkeley Research Group (BRG) in its 2020 report on California app-based driver and delivery worker job losses.

We have sourced proprietary, anonymised industry data that helps us estimate the number of Courier Partners across all app-based delivery platforms in Poland over a three-month period, as well as their hours of engaged work and their earnings. We also analyse merchants' orders and revenue data over the same period.

First, we estimate the increase in prices for consumers. Customers respond to higher prices by reducing their demand for app-based delivery services. We model two scenarios: a base case and a downside case:

Base Case

This scenario is the minimum impact we expect employment reclassification to have. We conservatively assume that cost increases will partially (75%) contribute to inflation, and that customers have a 'price elasticity' of -0.55, meaning that for every 1% increase in prices, customer demand will fall by 0.55%.

Downside Case

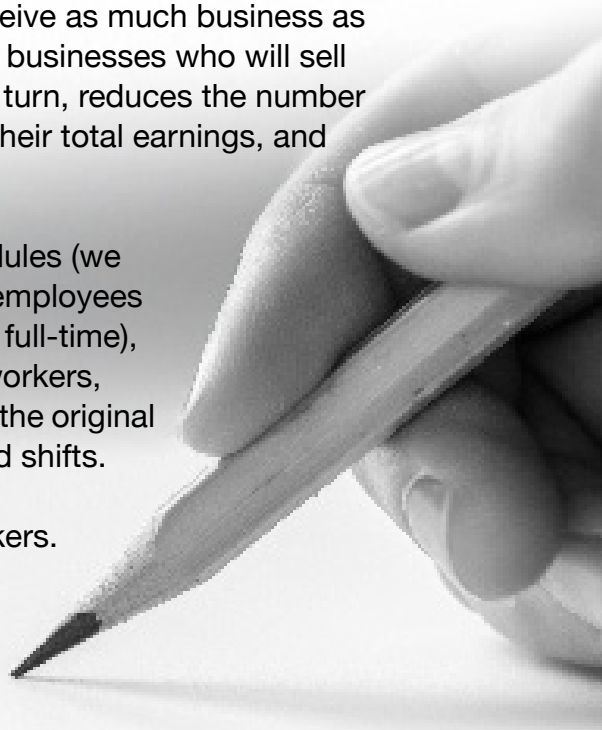
This scenario reflects the potential for a more significant negative impact. We assume that cost increases will fully (100%) contribute to inflation, and that customers have a 'price elasticity' of -1.2, meaning that for every 1% increase in prices, customer demand will fall by 1.2%.

Lower customer demand means that merchants will not receive as much business as they did previously. This will induce revenue losses for local businesses who will sell fewer goods through app-based delivery platforms. This, in turn, reduces the number of hours available for app-based delivery workers to work, their total earnings, and the number of earnings opportunities available.

App-based workers would also be converted to fixed schedules (we conservatively assume that half of the workers retained as employees are required to work part-time and half are required to work full-time), thereby reducing earnings opportunities for a vast pool of workers, since companies will be forced to employ only a fraction of the original number of workers and require each to work extended, fixed shifts.

Simply put, a smaller pie will be shared between fewer workers.

Additional details about our methodology are available on request.



[26]T Osman, Beacon Economics, How many app-based jobs would be lost by converting rideshare and food delivery drivers from independent contractors into employees in the Commonwealth of Massachusetts?: February 2022

[27]D Lewin, W Hamm, M Kim, Berkeley Research Group, Analysis of driver jobs if gig economy companies must reclassify drivers as employees rather than independent contractors: May 2020.

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