

The Dark Stores of Turkey

Getir bi mutluluk! “Bring some happiness!”
Are Getir’s Dark Stores Bringing Happiness?

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*“You don’t get hired here;
you come onboard. We
like to call it onboarding.
You don’t work for us; you
work with us. You don’t
drive for us; you perform
services. There’s no
employment contracts.
There’s no wages,
but fees. No clocking on.
You become available.”*

*Ken Loach, Sorry we
missed you (2019)*

Disclaimer: this study was performed as part of a larger project of UNI Europa in cooperation with FEPS on the rise of Q-commerce in Europe. This report on Getir in Turkey was made possible thanks to the support of FES Istanbul.

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EXECUTIVE SUMMARY

This study explores working conditions in the rapid delivery (q-commerce) sector that emerged over the past decade and developed rapidly during the Covid-19 pandemic. We focus specifically on the multinational company Getir, one of the main actors in the q-commerce sector in its home country of Turkey. The report has been prepared in the context of a larger study of q-commerce throughout Europe.

In the q-commerce sector, customer service happens within a closed circuit, only through apps. Rather than providing a physical store for shoppers, q-commerce companies operate wholesale warehouses behind closed shutters. Shoppers place online orders that are prepared by warehouse workers and delivered to the customers by motorcycle riders. In Turkey, these operations are called “dark stores” or “shadow stores.” Throughout this study, we will use the term “dark store” and we will refer to the delivery workers as “riders.”

For this report, we conducted a field study of Getir’s dark store working conditions. The first part focuses directly on the working conditions of dark store employees, and the second part focuses on the activities and strategies of trade unions in support of dark store employees.

It is also important to note that Getir is not the only company using dark stores in Turkey. One of Turkey’s largest retailers, Migros, launched its version of dark stores in 2019 and increased the capacity and operational efficiency of its online operations during the pandemic (Ulukan, G., 2020).

Getir’s Operations in Turkey

- The company is a platform economy giant that not only operates dark stores and supermarkets but also delivers prepared food and water and operates a taxi service. Getir’s riders generally work for more than one division of the company and are not uniquely attached to the commerce division.
- Most of the company’s riders are young and male and considered to be self-employed workers. Employees in the small logistics centres are permanent salaried employees as are some riders.
- Working conditions are difficult and the pay is low, with self-employed riders working up to 60 hours per week for approximately minimum wage. Opportunities for career advancement are almost non-existent.
- All riders, but especially those who are self-employed, face unpredictable schedules that make a reasonable work-life balance nearly impossible.
- Conditions tend to be worse in dark stores that are franchised (not managed by Getir).
- Getir’s competitors have been following Getir’s lead in using self-employed workers.
- Workers are managed through an app and an algorithm and have little to no agency in cancelling or refusing work assignments. And in addition to technological monitoring, “agents,” or field observers for the company constantly monitor the behaviour of riders.
- Although the company provides all workers with insurance and protective gear, traffic accidents are ubiquitous for riders. In addition to traffic, weather conditions (cold, heat) and difficult conversations with clients (including cases of

What is Getir?

Founded in 2015 in Istanbul, Turkey, Getir claims to be the world's fastest on-demand mobile retailer. Getir has expanded its service area internationally since 2020 and in 2022, reported its worth at \$12 billion.

The company declares that:

The main purpose of Getir is to make everyone's life easier by providing the highest level of convenience to everyone. We deliver thousands of products every day, from milk to diapers, from ice cream to detergent. Yet above all, we offer the most basic thing that every person on this planet needs: time.

Getir is a 70% technology, 20% retail, and 10% logistics company. By creating great technology, we can deliver very quickly, market efficiently and manage a complex supply chain system. (Getir, 2022)

Getir's app has been downloaded more than 40 million times, and the multinational company now caters to users in 9 countries on 3 continents, including the United Kingdom, Germany, France, Italy, Spain, the Netherlands, Portugal, and the United States. Getir has more than 1,100 warehouses in 48 cities abroad and in Turkey's 81 provinces. (Haberleri, S. 2022)

Getir declared itself a "decacorn" after reaching a valuation of \$11.8 billion. It was the first company in the rapid grocery delivery sector to surpass the \$10 billion threshold and receive the decacorn title in Europe. According to data published by CB Insights, Getir has climbed to 36th place among 1,052 unicorn companies (privately held start-ups valued at more than \$1 billion) in the world and 4th place in Europe. (Getir LinkedIn Profile, 2022)

extortion) are the primary risks for riders.

- Difficult working conditions result in massive employee turnover, with workers almost completely replaced within a couple of months.
- Although some riders have engaged in collective action, unions are not generally viewed in a positive light. The sectoral organization of industrial relations in Turkey creates a degree of uncertainty for trade union organizers, and at Getir, very little organizing has occurred. However, worker activities, including a 2022 strike, at the competing Yemeksepeti food delivery company have demonstrated that organizing and industrial action are possible.
- Trade unions' primary demands in the q-commerce sector are the prohibition of self-employed contracts, reduced working hours, increased pay, sickness leave, and limits on work pressure.

Many obstacles to labour organizing remain, including the fragmented nature of Turkish trade unionism, a lack of clarity in terms of the sector in which q-commerce belongs, and the self-employment model. Policy interventions are necessary to resolve the sectoral and self-employment problems.

The future of dark stores in Turkey—and at Getir in particular—will depend on market evolution because many observers doubt the sustainability of the model. Many are also sceptical of the regulation of self-employed work and the ability of trade unions to mobilize workers and engage in genuine collective bargaining. Without decisive policies and trade union action, Getir riders will remain in highly precarious, unsafe, and underpaid employment. And this business model will spread to the wider Turkish economy and world.

\$12 the value of **Getir**
in 2022
Billion

40 the number of times
the Getir app has
been downloaded
Million

Field Research Methods and Worker Demographics

We conducted a field study to determine the working conditions of employees at Getir in Turkey. We interviewed 21 people working in different provinces, including 9 interviews via LinkedIn, 6 by phone, and 6 face-to-face.

The fact that Getir provides services in different countries allowed us to compare the working and compensation conditions of workers in different countries as well as differences across various cities in Turkey. To reveal these differences, we conducted structured interviews with Getir employees in Adıyaman, Ankara, Antalya, Gaziantep, İstanbul, Konya, Tokat, and Rize.

There are two types of workers in Getir: employees in the warehouse (dark store) and riders who do the deliveries. Getir employs riders in two different categories: salaried

and self-employed. The employees in the warehouse and salaried riders are also referred to as “payrolled workers” or “permanent employees” and are under employment contracts. In addition to monthly wages, Getir pays the social security premiums of warehouse workers and salaried riders, including unemployment, illness, disability, and pension premiums. Their work week is 45 hours.

Getir signs self-employed riders to service contracts, not employment contracts. Under the terms of the service contracts, riders are paid based on their performance, and they have to pay the premiums for all social security themselves. There is also no limit on weekly working hours.

The rapid delivery sector is most popular among young people, and the youngest respondent in our study was 19 years old while the oldest was 37. Female employees are an exception in the rapid delivery sector.

While it was originally a job preferred by non-professional high school graduates, during the pandemic rapid delivery has become a job populated by university graduates who were not able to find employment in their fields.

Getir also offers services through franchise businesses, which apply Getir’s business model, including employing a small number of salaried riders along with salaried warehouse workers. The vast majority of franchisees’ riders are self-employed.

We should also note that although we did some research and requested information from Getir, we were not able to access any numerical data about franchise implementation.



Part One:

Working Conditions of Getir Dark Store Employees

Working Conditions and Worker Turnover

Given the low wages in Turkey, many people seek extra income as riders.

Wages are the main source of livelihood for permanent workers at Getir (salaried riders and warehouse workers). But for self-employed riders, who are primarily young men, the job is a source of additional income to supplement other jobs.

Youth unemployment is a big problem in Turkey. According to June 2022 data from the Turkish Statistical Institute, the youth unemployment rate is 20.4 per cent. Other calculations suggest that a broadly defined youth unemployment rate is around 40 per cent. The government is trying to reduce youth unemployment with various subsidies. In this context, self-employed riders represent the state's struggle against youth unemployment, and such jobs are seen as one of the main channels for young people to enter the labour market in conditions of high unemployment. At the same time, employers are externalizing their labour costs and transferring them onto these young self-employed workers.

The temporary premium and tax advantages granted to young entrepreneurs by the state are the leading reasons young men opt to work as self-employed riders.

Insurance premiums for people between the ages of 18 and 29 who established a company after June 1, 2018, are now covered by the state for one year, and their income below a certain limit is exempted from income tax for 3 years. However, at the end of this period, these supports are withdrawn, and the tax exemption

ends, leading to an increase in expenses and a decrease in revenue. As a result, Turkey has seen more riders demanding to switch from self-employed to salaried rider positions—demands employers have resisted.

The job description of a rider is clear and simple: timely delivery of packages to the customers. The job consists of motor driving, packages, and time, with no additional drudgery or duties. This certainty makes the work even more attractive. Many respondents previously worked for companies that also provided services through a platform, such as Burger King and Dominoes and therefore had some experience in platform work.

There are a variety of channels for finding work at Getir dark stores.

Some respondents said they got a job through job postings on the Internet, while others said they found their jobs through the mediation of a friend, a job posting on a shop window, or through word-of-mouth among bikers. The only qualification required from the applicants in the recruitment process is to be able to drive a motorcycle. Those who are working as self-employed riders must establish a company.

It is important to note that Getir runs its own dark stores but has also turned many of its stores into franchises, and the behaviour of the dark store franchise operators is as crucial to determining the good or bad management of working conditions and the labour process as are Getir's store operators.

One of the features that distinguish the rapid delivery sector from others is the high turnover rate.

"The staff completely changes every three months," according to one respondent. The period the respondents had been working for the company ranged from four months to one and a half years. The respondents attributed the high turnover rate of the workers (the entry-exit ratio) to demanding and harsh working conditions, the use of improper

Workers are notified of daily shifts only one day in advance, which affects the social lives of the employees negatively and causes uncertainty in planning.

equipment and clothing, and the costs that reduce income. The turnover rate is uniquely high in comparison to any other sector, the respondents said. The fact that young workers act more aggressively in the face of harsh and demanding working conditions also leads them to leave the job quickly.

The attraction of being a self-employed rider disappears after you get the job, but the large number of companies in the sector means the demand for riders is always high. The job of a self-employed rider, which is presented by Getir as a high-income employment opportunity, has instead become a means of employing workers below the minimum wage.

The high unemployment rate among young people helps employers hire workers for low wages, increasing the speed of turnover, which is already high as a result of poor working conditions and worker demographics.

Employers can quickly replace a worker who quits. And when an employee does not like the conditions in a workplace, they can quickly find a similar job in a different company. While the worker moves inside the sector's circle of structural exploitation, capital continues to accumulate by expanding the circle.

Apart from working conditions, two other factors affect the labour turnover rate: 1) age and age-related marital status and 2) the city where the workers live. Those who are young and single move faster and leave the jobs they do not like or do not see as fitting well immediately, while those who are 30 and older or married are a little more patient and cautious in changing their jobs due to family responsibilities. Workers in small cities do not change their work frequently due to limited employment options.

Although self-employed riders are perceived as independent workers, they know they are not independent because they do not have a say in the labour process, including working conditions.

Self-employed riders do not have a say in the scheduling of their shifts. Even under special circumstances, self-employed riders have to work between the hours dictated by the dark store. Workers are notified of daily shifts only one day in advance, which affects the social lives of the employees negatively and causes uncertainty in planning.

Working Hours and Work-Life Balance

Working hours are well above legal limits in this sector and irregularity of hours is built into the shift system.

Dark stores operate between 08:00 a.m. and 01:00 a.m., or for 17 hours daily. Work is divided into shifts during these hours, such as 08:00-16:00/16:00-24:00/17:00-01:00. According to respondents, interim shifts (such as 9:00-17:00) are added if the work is very busy. Shifts are usually planned for 8 hours, but they may vary based on the dark store. Respondents indicated that shifts could go up to 14 hours.

Warehouse workers and salaried riders regularly work 7.5 hours a day (8 hours with a half-hour break) and 45 hours a week. The working hours and shifts of self-employed riders were found to be irregular and over the legal limits. The working time of part-time employees also varies between 4 and 6 hours per day. The statutory weekly working time for workers is 45 hours, but there is no legal obstacle for riders working up to 66 hours. The annual limit of overtime work is 270 hours; however, with 12 hours of work per day, riders can work about a thousand hours more. Since self-employed riders are excluded from the scope of the labour laws because they belong to the Bağ-Kur system (self-employed individuals), this limit does not apply to them.

Getir informs dark store managers how many riders they will need the next day and the dark store manager makes the required plan and drafts the shift list accordingly. Although the work appears to be carried out within a predetermined plan and program,

the working hours can be extended or shortened depending on the current situation.

Riders are paid during their waiting time between deliveries.

Respondents indicated that there was no pay cut if they waited for a new delivery to arrive in their system after delivering a package. They might have to wait due to problems with package delivery. In this case, Getir monitors the process through GPS and phone records and acts accordingly.

The work-life balance of dark store riders is as uncertain and irregular as their working hours and shifts: "Life is only about work."

Riders say that they have busy work schedules because of the nature of their jobs on the one hand and the increasing workload due to the changing consumption habits during the pandemic on the other. Therefore,

the respondents say, there is no such thing as a work-life balance, and they spend most of the day working.

But permanent workers have a better work-life balance because they don't work too many hours, as they are limited by law in terms of overtime and how many hours they can work daily.

In dark stores, the number of employees varies depending on the region served and the type of service provided.

As mentioned above, both warehouse staff and riders work together in dark stores. The number of riders in a store (15-25 people) is quite high compared to the number of warehouse staff (3-6 people). Warehouse workers are in charge of preparing and packaging the products on benches based on incoming orders and arranging the shelves. Riders are only responsible for the timely delivery of orders that arrive in their terminals. The size of the warehouse and the number of employees vary depending on the size of the area served and the number of orders.

Relations with employers affect the control of workers in the business, and there is no equality in workplace relationships.

Although they do not have a boss-employee relationship in legal terms, self-employed riders seem to regard the store managers and Getir as their bosses. The self-employed rider cannot see the employer as an equal because the employer has unilateral control over the management of the job.

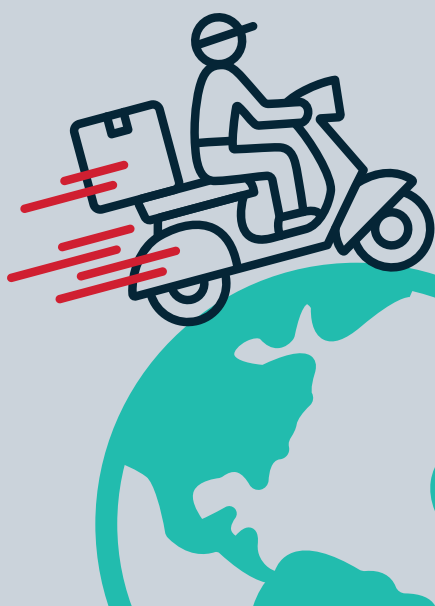
Compensation

Almost none of the Getir employees receive the same wage, and wages are somehow based on performance: "The more you work, the more you earn!"

The wages of dark store riders are not equal for a variety of reasons. Being a permanent staff member or a self-employed rider, using Getir's motorcycle or using one's

Constantly on the Move

Riders are constantly on the move on their motorcycles throughout the day, driving up to 200 km per day, especially in big cities such as Istanbul, Ankara, Antalya, and Konya. If we take an average of 150 km per day, a rider goes once around the world in about 267 days.



a rider goes
once around
the world in
about **267**
days

own are factors that affect the wage calculations. Monthly wages are determined by a fixed hourly rate and a rate per package, which vary depending on these factors. The data collected from the respondents revealed different wage calculations in different warehouses in different provinces and even in the same province. Moreover, it should be noted that permanent workers are paid a meal allowance of 500 TL.

To illustrate briefly: Hourly wages are 25-27 TL for salaried riders and the fee per package is 2 TL; for self-employed riders, depending on whether they own their motorcycles or drive Getir's motorcycles, the hourly wage is 30-35 TL, and the fee per package is between 2.5 and 4 TL.

There are also differences among the provinces: Employees in Antalya have reportedly higher wage calculation rates and those in Tokat and Rize have lower wage calculation rates.

The calculation of the monthly wage is based on the total hours worked and the packages delivered. According to labour laws in Turkey, workers work 45 hours per week (one day of the weekend is considered a workday, which is paid) and a total of 225 hours per month. Respondents have stated that the wages of warehouse workers and permanent riders are calculated according to the labour law, but the self-employed riders are subject to a more flexible work schedule outside these hours since they are not covered by the labour law.

Wages are not high enough for the effort exerted.

Self-employed riders seem to earn more than permanent workers. Their total pay can be twice or three times that of permanent workers. However, when expenses such as taxes, insurance premiums (Bağ-Kur), and fuel are deducted, net income decreases significantly. A self-employed rider bills an average of 12 thousand TL per month for time worked and the packages delivered. However, after deducting taxes,

premiums, and fuel, they end up with a net minimum wage of about 5500 TL; during peak periods, the riders earn a net income of a maximum of 6500 TL.

Soaring fuel prices have led to a decrease in the income of riders, especially those who work with their own motorcycles. These riders end up either working faster or taking on additional work to increase their income.

The study revealed a performance-based scoring system.

In the rider system, a worker must achieve a certain score; if they fall below the quota, their fee per package also decreases. This translates into a transfer of revenue from the rider to the employer. Star ratings given by customers have also turned into a punishment mechanism used against the riders. The employer charges a penalty that is deducted from wages and increases the level of exploitation based on low star ratings.

Meal breaks are unpaid, and in violation of the labour law, all workers must take breaks of the same duration regardless of the number of their working hours.

The meal break is regulated under rules for "rest breaks" in Turkey, based on Article 68 of Labour Law No. 4857:

Article 68: Employees shall be allowed a rest break approximately in the middle of the working day fixed with due regard to the customs of the area and the requirements of the work in the following manner: a) fifteen minutes, when the work lasts four hours or less; b) half an hour, when the work lasts longer than four hours and up to seven and a half hours (seven and a half included); c) one hour, when the work lasts more than seven and a half hours. These are minimum durations, and the full period must be allowed at each break. These break periods may, however,

A worker must achieve a certain score; if they fall below the quota, their fee per package also decreases.

be split up by contracts where the climate, season, local custom, or nature of the work so requires. Breaks may be taken at the same or varying times by the employees at the establishment.

We have already stated that the daily working time of Getir employees is 7.5 hours. On the other hand, respondents have also reported that self-employed riders, in particular, work up to 14 hours. During this period, employees are required to use a break of up to 1 hour if they are salaried workers. Self-employed workers do not have such a right, and they often do not take breaks during their shifts so they can make more money. Whether a rider will be using a meal break fully depends on how busy the work is. If necessary, a break can be interrupted when an order arrives.



The maximization of income directly depends on work performance, which serves to maximize the profits of the employer.

Dark store employees can increase their income based on the number of packages they deliver. There are two ways to increase income in this

type of work: The first is to deliver packages very quickly, and the second is to work more hours, which includes working during breaks.

It is understood that self-employed riders must work extra time. The fact that permanent employees covered by social security are subject to labour law and therefore have to be paid incremental wages for overtime (50% of the hourly wage is paid for overtime) plays a role in leading employers to use self-employed riders who do not have such a right.

However, it is not possible to increase income by working overtime in every city. The statements by the respondents reveal that overtime is required based on the amount of work in big cities such as Istanbul and Antalya, but in smaller towns such as Rize and Tokat, the employers do not require much overtime.

Self-employed riders do not receive a wage slip because they are not salaried workers.

Permanent workers are subject to a “double payroll,” which means their minimum wage is deposited in the bank and the remainder is paid in cash.

Self-employed riders are sent a message showing their total pay consisting of the total wage they should receive based on the number of hours they have worked and packages they have delivered. They check it against their records. Respondents indicate that there is generally no discrepancy. They forward the remuneration amount to their accountants, issue an invoice, and send it to Getir. Getir deposits the wages for that month to the riders’ accounts.

A striking finding that emerged from the interviews is that the minimum wage portion (the compulsory amount that should officially be paid) of the salaries of the permanent employees is deposited in the bank account and the remainder is paid in cash. There are two reasons employers prefer this practice: 1) The base for calculating

Riders do not think that they get a fair income considering the dangers and risks of the work.

The respondents reported that instead of resting on their days off, they are busy maintaining their motorcycles or taking care of their family's needs.

the rights of a worker leaving the company, such as notice and severance pay, remains low. 2) This reduces the income-based taxes to be paid to the state. In other words, the employer is hiding money from both the employee and the state which can be considered unlawful. However, it seems likely that this practice is more a choice of the franchisee rather than one that is directly the responsibility of Getir.

Employees do not consider their wages to be fair.

Although they think that they are relatively better compensated for their labour than workers in other jobs, riders do not think that they get a fair income considering the dangers and risks of the work.

We have previously stated that the young entrepreneurship program is one of the factors that make riding seem lucrative in the eyes of young people. The respondents said the wages received within the scope of the young entrepreneurship program were ideal, but that once the system came to an end, they did not receive fair pay for their labour.

Employment Status, Contracts, and Social Protection

A rider signs a contract when they get a job, but the employer does not give them a copy, and they don't know exactly what they signed.

Both permanent workers and self-employed riders are asked to sign a contract when they are first recruited. However, neither the permanent workers nor the self-employed riders keep a copy of the contract. The statements of respondents indicate that they do not know exactly what the contracts contain, including what their rights and duties are.

Self-employed riders regard themselves as workers of Getir rather than its business partners.

The basic question about self-employed riders is whether they are self-employed individuals working for

themselves or salaried workers for the company. The main factor determining whether a person is an employee or an employer/independent employee is the right and authority to intervene in the management of the work in the employment relationship or labour process. The self-employed riders interviewed said they made no decisions or were not even consulted about issues ranging from working hours to work clothes, and from overtime work to taking a day off.

Warehouse workers and salaried riders have social protections, while self-employed riders are excluded from social protections.

While salaried workers have the right to paid leave, self-employed riders have only unpaid leave. Since self-employed riders are self-employed, taking leave is not a right but a choice for them. Workers are required to take one day off every week according to labour law, but self-employed riders may choose to work and increase their earnings instead of taking a day off. The respondents reported that instead of resting on their days off, they are busy maintaining their motorcycles or taking care of their family's needs. Self-employed riders also do not enjoy many social protections, including unemployment benefits.

If self-employed riders can get a temporary incapacity report when they get sick, a certain percentage of their earnings will be paid to them by the social security institution (SSI) if they have fully paid their premiums.

Earlier, we talked about the negative effects of the double payroll practice. In addition to those effects, the temporary incapacity allowance is also based on a worker's average wage for the preceding three months. Therefore, an employee whose wage is reported as lower than it actually is must survive on an even lower income during the period when they are sick.

Except for the phone, the equipment used by the employees for work purposes is generally covered by Getir.

Many riders operate their own motorcycles, but practices differ depending on the franchise companies. Respondents stated that some warehouses sold or rented equipment to workers, including helmets and motorcycle jackets. Repair and maintenance costs are covered by the owner of the motorcycle. So, if a rider uses Getir's motorcycle, all maintenance costs are covered by Getir. However, if the rider is at fault in an accident, they must pay a part of the maintenance and repair costs, even if the motorcycle belongs to Getir.

Task Assignments and Evaluations

Getir assigns jobs through the so-called MDU application.

In this system, orders arrive at the warehouse and riders are notified. The dark store warehouse employee prepares the packages according to the incoming order. The rider takes the prepared package that is assigned to him by the system and delivers it to the customer.

The algorithm routes orders based on the "busy" or "available" status.

Employees say they quickly learn the Getir algorithm, which is not

complicated. However, during the interviews, we discovered they did not understand or care about the algorithm. The algorithm is based on sending more work to the rider who is favoured by customers (according to the star rating system). In other words, good customer relations are directly correlated with increased earnings.

The respondents also said that the algorithm did not exactly work this way and there were differences in the distribution of work.

Riders have to deliver the package that they are assigned on their phones. The package that arrives through the system can be cancelled under two conditions: The first is an address error; the second is when the customer cannot be reached. In both of these cases, the cancellation is not done by the rider, but by the warehouse or customer service. Apart from this, riders do not have the authority to refuse or cancel work. They told us they could not make changes to the routes because the system also sent them the precise delivery routes.

Technology is used for employee monitoring, and company agents are also watching on the ground.

The rapid delivery industry is all about speed, by definition. Given that waiting time is also paid, working employees bring income while waiting employees incur a loss for the company. For this reason, this sector carefully monitors employees and makes use of technological tools in the process. The application downloaded on the riders' phones transfers data about the location of the rider, whether they are available, the speed of the motorcycle, brakes, and whether they have driven through a red light—all of which can be monitored instantly.

Riders are monitored and observed in the field not only technologically but also by the company through agents. The field observer scores the behaviour of the riders, and in a way, this scoring determines whether they



will continue to work or not. Therefore, we can say that a double monitoring system is used by Getir.

There seems to be time pressure on employees, but the pressure is not directly applied by Getir or the algorithm; it is maintained by the franchisees.

The algorithm does not cause many problems according to respondents. The few problems they experience are resolved in a short time by customer service.

There is no clear standard practice across all dark stores.

The system does not assign only goods from the dark store to the riders. Sometimes riders are also assigned food from restaurants. Depending on the orders, packages can be picked up from the warehouse or other contracted stores and restaurants and delivered to customers. This is not the case everywhere. In other words, it appears that there is no standard practice.

Personal Development and Training

Working as a rider is not perceived as a permanent job.

None of the respondents, except for one, said they can or will do this job permanently. Poor working conditions, the high pace of work, low wages, the behaviour of customers and society towards riders, and limited career opportunities are among the factors that affect the riders' thoughts. The fact that this job is mostly preferred by young people is not as much due to working conditions and wages but perceptions. Respondents said they believed it would be difficult to keep up with the fast pace and requirements of the job as they aged.

The fact that in-house training and career opportunities are very limited leads employees to ask themselves whether working as a rider is a real profession. The fact that the answer to this question is usually "no" affects how long employees stay in this job.

A long-term career at Getir is seen as almost impossible.

Employee groups or categories within Getir include customer service, field security, field experts, traffic safety, and warehouse. These categories can be regarded as the steps of a career. However, respondents did not believe it was likely that riders could transition to these jobs. While they indicated that the warehouse workers they collaborated with in dark stores could become warehouse managers, the riders believed that their jobs would not lead to long-term careers with Getir.

Health and Safety

The biggest risk to riders is traffic.

Busy traffic and disregard for rules can cost riders their lives. And unfortunately, we often see news of riders who die on the roads in Turkey. One of the demands riders rightly voice is that their job is classified among the most dangerous occupations in the country.

Getir provides private health insurance and driver training to both salaried and self-employed riders.

Respondents mentioned health insurance and certified driver training as positive practices in health and safety. The entire cost of driver training is covered by Getir. As mentioned above, security personnel on the ground monitor whether the riders use appropriate personal protective equipment (PPE), including jackets, trousers, helmets, and gloves. They also monitor riders' level of compliance with health and safety rules.

The most important rule for riders is safe driving, which requires observing the speed limit. The speed limit Getir imposes varies among different provinces, which suggests that the speed limit is not set to ensure employee safety but is designed according to the transportation and delivery speed calculation in the relevant delivery area.

One of the demands riders rightly voice is that their job is classified among the most dangerous occupations in the country.



While private health insurance for all employees appears to be a positive practice, it also points to the fact that this line of work involves frequent accidents. Private health insurance is not preventive and protective, but rather a corrective/therapeutic instrument after an accident or illness. When we consider the function and logic of insurance, we can say that rather than prioritizing the health and safety of the workers, by providing insurance the employer wants to protect itself against heavy costs in case of accidents and illness.

Accidents with motorcycles, or being hit by a driver, have become routine risks.

Nearly all riders have had an accident, and this is accepted as a fact of life. The most common type of work accident is falling while on a motorcycle due to distracted drivers making mistakes.

Personal protective equipment (PPE) is distributed in full by Getir but may not be suitable for work or protecting health.

Although few respondents reported problems with the distribution of PPE, they did mention complaints about the quality of PPE and its suitability for work. The respondents emphasized

that the jackets did not protect from the cold in the winter and could not be worn in the summer heat.

More than the work itself, several external factors, such as poor roads, traffic, weather conditions, and night work adversely affect the health and safety of riders.

Respondents stressed that a series of hazards, ranging from the road infrastructure to negative public perceptions of riders threaten their health and safety. The sources of danger they discussed can be classified as follows:

- » Bad weather conditions (snow, rain, storms, wind, cold, heat),
- » The dangerous physical infrastructure of roads,
- » Poor street lighting at night,
- » Drunk driving,
- » The behaviour of intoxicated people,
- » Vehicles that travel in the opposite lane,
- » The public not accepting motorcycles as legitimate vehicles (harassment by drivers, other vehicles cutting in, etc.), and
- » Dogs that chase after motorcycles

Employees face the constant threat of occupational diseases.

“I was wrapping cardboard around my body with duct tape against the wind,” said one respondent. “Helmets cause neck pain, and wind causes pain in the lungs,” said another.

The health of riders is being jeopardized daily. Coughing caused by lung disorders due to weather conditions; accidents as described above; joint pain in the knees, elbows, wrists, and hips; and hernias in the back and neck are among the most common ailments. The vibration caused by the suspension of the motorcycle over uneven

Actions in the rapid delivery sector can give rapid results, because each passing second of a labour action means a loss of income for the employer.

roads also leads to musculoskeletal disorders.

The most striking finding about the health of riders is that the company does not cover the first 10 days of medical leave in the case of an accident or illness. The rider is treated as if they have taken an unpaid leave of absence. This results in a significant loss of income along with health problems.

Complaints and Dispute Resolution

There are not many problems with the performance of the work. When problems occur, they are solved between the employees and their immediate managers.

When a work-related problem arises, depending on the level and relevance of the problem, the solution mechanisms lie with dark store branch managers/supervisors, shift managers, chiefs of riders, field managers, province and regional managers, and customer service. But for the most part, the respondents said that they solved the problems mostly among themselves.

Respondents reported that if they have a problem with wages, a branch manager can be contacted; but they also stressed that so far no one has had a problem with the calculation or payment of their wages.

There are some infrequent problems in the algorithm, i.e., the app. For example, an order arrives without address information. In this case, the rider calls customer service to inform them of the problem. The problem is thus communicated to the software team, and that team can directly access the application on the person's phone and make the necessary correction.

Riders believe that violence against them is taken too lightly by customer service.

Bullying and harassment by both customers and people on the street are common. Respondents said that some riders experienced mugging.

In such cases, customer service is immediately informed.

Riders are asked not to engage in any dialogue with customers. In the event of an accident or injury, the warehouse manager and chief of riders are informed and the package is cancelled.

Giving low ratings has become a mechanism for punishing riders. The fact that an employer uses ratings as a wage deduction penalty increases the level of exploitation. The fact that customers evaluate the performance of riders through star ratings and that a low star rating reflects negatively on both job security and wages creates indirect pressure on the riders. Such a situation adversely affects the psychology and well-being of the riders.

Unionization

Getir employees are not unionized; they also seem somewhat lukewarm about the value of trade unions.

We detected no unionization effort among employees of Getir. Employees are a little wary of having unions in their workplace. They claim that unions cannot obtain a decent wage in the workplaces where they are organized and that workers end up signing contracts at the minimum wage level after months of negotiations. In terms of the advantages of a union, respondents mention the ability to communicate problems directly to the employer.

Many respondents closely followed the organizing effort at Yemeksepeti. They maintained that the workers carried out collective actions to seek rights in their workplaces and as a result, they got what they wanted. Therefore, they are aware that collective action will yield results in a short time. In other words, actions in the rapid delivery sector can give rapid results, because each passing second of a labour action means a loss of income for the employer.

The primary expectation from a potential union is the elimination

of the self-employed rider system, but other problem areas could be addressed.

The following is a list of the problem areas mentioned by the respondents and how a potential union could resolve them:

- » Eliminating the self-employed rider system,
- » Reducing working hours,
- » Gaining better wages and working conditions,
- » Establishing the right to annual leave with pay,
- » In case of accident or illness, ensuring the employer would cover the wages for all days while on medical leave,
- » Offering food allowances or food services, and
- » Establishing longer breaks.

Employees think that the presence of a union can be good for solving the above problems in the workplace. The primary expectation from a trade union is the elimination of the self-employed rider system following which all riders would become Getir's permanent employees. Although self-employed riders seem to earn a little more than salaried riders, they say they would work in a system that provides a wage between the two amounts.

Beyond the financial expectations, the expectation that unions could improve the behaviour of drivers toward riders in traffic is striking.

Factors preventing the riders from meeting to share their experiences in solidarity include a heavy workload and lack of time.

Riders meet among themselves in different ways and exchange their experiences. These meetings take place through physical means or social media, depending on the location of stops and the city. Riders

do not only share their experiences in actual meetings, sometimes they talk when they wait at a red light or deliver packages to the same place. These contacts can be limited to Getir employees or include riders working for other companies.

Of course, riders do not only share experiences; they also stand in solidarity in the face of problems such as theft and violence. Often, they are not able to get together for long periods because of long and tiring working hours.

The fast pace and the high turnover rate of the workers also affects the interpersonal relations of employees affiliated with the dark store, with respondents saying this helped them have relatively fewer problems.

Part Two:

Strategies for Trade Union Activities Addressing Dark Stores

Within the scope of this study, interviews were held with union managers and experts in both the commerce and transportation sectors to find out about union activities targeting dark stores. Interviews were held with Tez-Koop-İş (Türk- İş) and Sosyal-İş (DISK) in the Commerce sector and Tümtis (Türk- İş) and Nakliyat-İş (DISK) Unions in the Transportation sector. Dark stores are included in the commerce sector according to legislation in Turkey. However, until 2021, these jobs appeared in the transportation sector, and therefore, Tümtis and Nakliyat-İş from the transportation sector carried out organizing in workplaces employing high numbers of riders. For this reason, in addition to interviews with the union managers in the commerce sector, the study also included interviews with the above-mentioned two transportation unions because they had done organizing work in this sector and were also subject to a lawsuit.

Those who participated in interviews include:

- » Çağdaş Duyar, General Organizing Secretary of Tez-Koop-İş Union;
- » Celal Uyar, General Secretary of Sosyal-İş Union;
- » Gürel Yılmaz, General Secretary of Tümtis Union;
- » Murat Küçükşahin, Secretary of Istanbul Branch of Tümtis Union;
- » Kaan Gündeş (also a former employee of Yemeksepeti); and

- » Ali Rıza Küçükosmanoğlu, President of Nakliyat İş.

Koop-İş Union (Türk- İş) was also contacted but we received no response from them.

General Evaluation

Organizing activities for the rapid delivery/commerce sector have been carried out only by the unions in the transportation sector.

We found out that the first union work in this sector was carried out at Yemeksepeti, purchased by Delivery Hero in Turkey, by unions in the transportation sector. Yemeksepeti is mostly focused on the delivery of prepared food but has also started grocery delivery.

Although the sector now appears under commerce, trade unions in this sector have not done a clear study of the industry nor have they allocated special staff to organizing. The uncertainty regarding the position of the industry has had an impact on this. This uncertainty, which stems from a lack of clarifying legislation and allows the employer to behave as it pleases, also turns into a major obstacle to the organization of employees.

Dark stores and quick commerce: conceptualized as capitalism's new model of accumulation.

Although unionists say they have not heard of the concept of a dark store before, they maintain that q-commerce and e-commerce, within which the concept has developed, are a new accumulation model for capitalist globalization. Precarity, which lies at the centre of this style of work and employment, appears to increase informality and lack of supervision. So, although the term “dark stores” may not be known, the practices are known.

The experts and managers involved in organizing work are no strangers to the dark store practice because they have seen it directly in the field. Getir made the dark store system more

visible in the q-commerce sector, while also boosting its growth. But Getir is no longer the only company of its kind. Both the respondents and our field observations indicate that companies dealing in different products have started to serve in the q-commerce sector. For example, while Yemeksepeti only provided food delivery services until a few years ago, it now also works with dark stores. The company previously offered dark store services under the brand name Banabi, and now serves directly under the name Yemeksepeti Market.

The difference between dark stores and quick-commerce or e-commerce lies in the target audience and the coverage area served.

While dark stores and q-commerce only serve a local audience, e-commerce has a global scope. Both are means through which technology responds to the needs of consumers.

The only difference between food delivery and dark stores is product variety.

In general, food delivery and dark store services look quite similar. They are both parts of a whole system and are an aspect of

monopolization that imposes its terms on small (and large) businesses in the commerce sector.

Development of the Sector

E-commerce is not a new phenomenon in Turkey: Hepsiburada.com, which was founded in 1998 was the first such initiative.

The convenience of online shopping and the variety of products it provides created a field of consumption independent of time and space. The first example of e-commerce in Turkey is Hepsiburada.com, founded in 1998. Gittigidiyor.com, founded in 2001, and Trendyol, since then acquired by Alibaba, and launched in 2009, are also among the first companies established.

Smartphones and Android apps played a major role in the development of this sector.

All union representatives and experts interviewed highlighted two factors influential in the development of the rapid delivery sector: 1) smartphone apps that enable e-commerce on customers' phones and 2) restrictions imposed by the Covid-19 pandemic.

The pandemic, in particular, accelerated the development of the sector and boosted the growth and profits of these companies beyond expectations. For example, the CEO of Yemeksepeti has said that the company grew twice as fast as expected during this period. (Capital.com.tr, 2021)

The busy and long working hours imposed by capitalist production make it difficult for individuals to allocate time for shopping. So, individuals are forced to change the way they choose the time and place to buy products. Instead of going to brick-and-mortar stores, it often makes more sense for people to order via smartphones or other electronics.

Although e-commerce has a history of about 25 years in Turkey, the q-commerce sector is younger.



Workers are not only separated physically but also divided in terms of their employment status as salaried and self-employed riders.

For a long time, only local companies had a presence in both e-commerce and q-commerce in Turkey. As mentioned above, in terms of rapid delivery, Hepsiburada.com, Gittigidiyor.com, N11.com and Trendyol were the first companies in e-commerce and Yemeksepeti was the pioneer in the food industry. Getir later entered the market as a player in q-commerce and recorded rapid growth. The multinationals Amazon, Alibaba (which acquired Trendyol in 2018), and Delivery Hero (which acquired Yemeksepeti in 2015) followed.

Most of the companies in the sector start with a concentration on home goods, clothing, and books. While Yemeksepeti initially delivered food orders and Getir delivered groceries, the increasing competitive pressure in the market forced companies to diversify their products, and they have now all started to deliver a variety of fast-moving consumer goods.

The companies have expanded to serve all geographical areas.

While in the beginning, local companies were serving only big cities, the entry of multinationals into the market and the restrictions of the Covid-19 pandemic gradually drove the coverage of the sector to even the remotest parts of Turkey.

Statements by unionists from both the transportation and commerce sectors show that they have been watching the emergence and development of the sector closely.

Unionists see the internet as the main driving force behind the growth of the sector. The internet is perceived as the primary axis in the development of the sector as a means to meet the needs of the consumers in a way that saves them time and offers more variety.

On the other hand, some unionists believe that the emergence of this sector had the direct goal of suppressing trade union rights.

Company Infrastructure, Employment Relationships, and Working Conditions

The rapid delivery sector makes unionization and the development of the working class almost impossible as this is often the first job experience for young men, and the situation prevents workers from working together.

Workers are not only separated physically but also divided in terms of their employment status as salaried and self-employed riders. Union representatives maintain that employers prefer the self-employed rider model in the rapid delivery sector. The self-employed rider status not only excludes the riders from the scope of labour law but also prevents them from enjoying their rights under the law regarding trade unions and collective bargaining as they are not considered workers. Therefore, the employer is not bound by the obligations stipulated by laws on trade unions and collective bargaining.

Respondents we interviewed reported that the provision of equipment for their work depended on the company, the employment relationship, and their employment status. In practice, there are some differences among companies. For example, Getir provides motorcycles to all self-employed riders who do not have their own motorcycles while Trendyol does *not* cover any costs affiliated with self-employed riders.

One of the major findings of our investigation is that companies follow each other closely. For example, at Yemeksepeti, all riders used to be salaried employees but once Getir started outsourcing the service to self-employed riders, Yemeksepeti also adopted a self-employed rider model. Respondents indicate that this can also be associated with the organizing activities among the workers at Yemeksepeti.



The country's high inflation and youth unemployment rate have played a role in increasing the number of riders.

Major Labour Force Issues and Concerns

The biggest problem voiced by union representatives about the sector is the fact that all employees—and riders in particular—experience precarity because there is no comprehensive legislation regarding this type of employment.

During our interviews, union representatives said that regardless of whether they are self-employed or permanent workers, all riders experience poor working conditions. Exposure to noise and exhaust gases during long trips in traffic is a major threat to their health. Moreover, respondents said that job-related stress also harmed the workers and their families.

The hybrid employment model produces significant challenges.

A precarious mode of employment always maximizes an employer's profits. Self-employed riders have no social security or healthcare coverage. Companies that now employ salaried workers are seriously considering shifting to self-employed riders.

This mode of work is believed to have been triggered by rapid delivery and dark stores. The profitability makes it attractive to other companies, and it increases competition. Union managers point out that self-employed riders eliminate the ground for union struggle and organizing. And the true outcome is clear: The working conditions and wages of the riders in q-commerce—particularly in dark stores—are not deemed worthy of human dignity.

The level of education does not match the rider's job.

In the past, riders were mostly people with low levels of education, but nowadays university graduates who have not been able to find employment for long periods opt to work as riders, a job that does not require many special skills. Working as a rider only requires the ability to ride a motorcycle and obtain a motorcycle license. Yet this job is not accepted as an occupation.

Unionists and other experts also argue that the country's high inflation and youth unemployment rate have played a role in increasing the number of riders. On the demand side, the sector has hundreds of companies that vary widely in size. Therefore, riders find employment easily while employers have no challenges in finding cheap labour due to the structural problems of the labour market.

The working conditions and wages of the riders in q-commerce—particularly in dark stores—defy human dignity.

Union representatives stress that factors such as low wages, long working hours, the need to work longer and harder to increase one's income, lack of social security, and the inadequacy of occupational safety measures and personal protective equipment (PPE) all harm the quality and conditions of riders' work. On the other hand, the increasing pressure by employers against unionization efforts affects the well-being of the employees.

Opinions differ dramatically regarding the future of the sector, with some arguing the sector will shrink, in part as a result of the trade union struggle, and others saying the sector will grow.

One of the solutions offered for all the problems is the proposal to ban the self-employed rider model.

Trade Union Practices and Strategies

Employer-friendly legislation and provisions barring union organizing along with the uncertainty of the sector stand in the way of trade unions organizing employees in dark stores and q-commerce.

Trade unions use conventional organizing strategies in the face of new forms of employment and compete with one another. But the main reason for current challenges in labour organizing is the fact that the trade unions did not intervene while the sector was in the early stages of development.

Workers in the rapid delivery sector were covered under the transportation sector until 2021. The first union organizing in the sector took place at Yemeksepeti. The transportation trade union Tümtis had the required majority of workers to gain the authority to carry out collective bargaining, which was also approved by the Ministry of Labour and Social Security. However, Yemeksepeti filed a court case against the union.

No contract can be signed in this workplace until the court case is finalized. Therefore, the struggle for collective bargaining in this sector has so far yielded no result because of the employer's objection.

Confusion based on the uncertainty of which sector should cover rapid delivery work prevented the trade unions in the commerce sector from adopting a clear position. Union representatives we interviewed agree that trade unions have not developed strategies that can adequately respond to new jobs and employment models created by technological change.

Trade unions in the transportation sector appear to have an advantage in organizing as a result of past

experience, but the constant mobility of rapid delivery workers makes all organizing difficult.

Unionization in this sector can only succeed if transportation and commerce trade unions unite instead of clashing.

Solutions include:

- » Awareness-raising activities. Brochures and publications should explain that the job of a self-employed rider has no advantages.
- » Trade unions should continue and reinforce their organizing efforts.
- » Trade unions should lobby parliament and politicians to enact corrective and comprehensive legislation for the q-commerce sector. Many workers expect the government to enact legislation to ban self-employed riders—and enforce the ban, declaring all employees salaried workers and recognizing riding as an occupation.
- » The government should also find an immediate solution to the question of whether riders are in the transportation or commerce sector.
- » Trade union managers not only want an end to the self-employed rider; they also want workers to have working conditions and wages that befit human dignity.

Future Trends and Developments

Opinions differ dramatically regarding the future of the sector, with some arguing the sector will shrink, in part as a result of the trade union struggle, and others saying the sector will grow.

All union representatives agree that the developments in informatics and telecommunication technologies will transform jobs and the labour market in the future.

They forecast an increase in new forms of work, such as remote and

on-call working and q-commerce. And many anticipate a continuing shift in consumption from physical spaces to virtual spaces and mobile apps, driven in part by young people. These shifts may further reduce the number of physical stores, including shopping malls, and even make them obsolete.

In addition to current actors in the market, traditional retailers—including Migros, CarrefourSA, Boyner, and others—have moved into q-commerce by setting up platforms and are considered a sign that the sector will continue to grow.

On the other hand, the unique high turnover rate in the q-commerce sector that seems to be a perfect model for employers could also

expand the union organizing struggle and reduce the growth of this sector.

Note the example of Getir, which grew at a fast pace during the height of the pandemic but recently announced a 14% reduction in its global workforce. (Wayte, T., 2022)

Some projections suggest that although the market has been dominated by big companies so far, these companies will outsource delivery to subcontractors in the future.

As long as the self-employed rider model exists, we believe union organizing looks very difficult, as self-employed riders have become a kind of anti-union apparatus.

Conclusion

Current labour legislation makes it impossible to organize riders, especially the self-employed. Even if some riders and warehouse workers become members of a union, it is impossible to exercise union power in the workplace when a large number of self-employed riders cannot become union members.

The self-employed riders have become an anti-union force, which is why the best solution for the labour movement would be to prioritize organizing and collective struggle together, independent of various unions and confederations active in the sector. Classical organizing models simply do not fit the realities in the sector.

Still, poor working conditions and unfair practices are likely to spark spontaneous collective actions, which trade unions can and must seize upon and build on.

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