# Uncovering platforms: investigating and visualizing the variety of platform capitalism in Italy and Spain.

Author: Massimo De Minicis, *INAPP*





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# Uncovering platforms: investigating and visualizing the variety of platform capitalism in Italy and Spain.

MASSIMO DE MINICIS

*INAPP*

Contact: m.deminicis@inapp.gov.IT



**Abstract.** This paper critically examines the phenomenon of platform capitalism through the lens of national contextual factors that shape its evolution, challenging the prevailing tendency in the literature to emphasize convergence towards a uniform North American entrepreneurial model. Two theoretical perspectives emerge: one positing a uniformity in platform models and the other advocating for diversification due to varying institutional frameworks. While platforms aim for global scalability through established business models, the influence of distinct economic contexts on their operations remains underexplored. This study argues for a deeper investigation of national specificities in platform capitalism, particularly through the framework of Varieties of Capitalism (VoC). The analysis focuses on two Mediterranean economies, Italy and Spain, exploring how food delivery and ride-hailing platforms interact with their mixed market systems, thereby illuminating the differential conditioning and differentiation processes inherent in these contexts.

**Keywords**: Platform, Social research, Varieties of capitalism, Italy and Spain.

## CONVERGENT OR DIVERSIFIED CAPITALIST BUSINESS MODELS?

The phenomenon of platform capitalism has been the subject of considerable academic scrutiny from a multitude of theoretical perspectives. However, there is a tendency to underestimate the extent to which differences in approach can be attributed to the influence of local contextual factors. The existing literature on platform capitalism tends to undervalue the differences between countries and overestimate the convergence towards common regulatory frameworks that transcend national borders, with all experiences being made to conform to the pioneering North American model (Uber, Amazon Mechanical Turk, etc.). In examining the phenomenon of platform capitalism, two distinct theoretical perspectives emerge. The first postulates the convergence of the platform economy towards a uniform entrepreneurial model. The second, to the contrary, suggests the diversification of platform entrepreneurial models because of interaction with institutional frameworks. If, indeed, it is reasonable to view platforms as entrepreneurial entities striving to operate on a global scale through a pre-established business model (Kenney, Zysman 2020), the impact of disparate economic frameworks remains an open question as they evolve in diverse international contexts. It is evident that there are pressures towards the standardisation and new form of intermediation of institutions that regulate the labour market, industrial relations and social protection. However, it is pertinent to question whether the responses of national contexts are uniform. The constraints that remain have the potential to exert influence over the fundamental aspects of the platform economy, including the nature of relations with workers, the forms of financing employed, the governance of the company, relations with trade unions and institutional organisations. It is therefore imperative to examine whether there are national specificities within platform capitalism. In this regard, an important body of literature that merits reconsideration concerns studies on the variety of capitalisms (Hall, Soskice 2001), as well as the articulation of this approach (Molina, Rhodes 2007) with reference to mixed economies, to finally turn to the most recent classification by Donatiello, Ramella 2017 or Burroni, Pavolini, Regini 2022 to specifically frame the two countries under comparative analysis. The paper will examine the characteristics of this interpretation in two mediterranean capitalist scenarios to determine whether the platform enterprise also exhibits the conditioning and differentiation processes as outlined in the VoC theory. Two sectors of platform capitalism will be examined in relation to their interactions with the economic contexts of Italy and Spain. The focus of the analysis will be on the impact of food delivery and ride-hailing platforms on the mixed market economies of both countries.

## THE VARIETIES OF CAPITALISM

In the study of different models of capitalism, the seminal work is unanimously considered to be that of Peter Hall, David Soskice 2001. In this sense, the micro-situated choices (of firms) and the way they interact, both with each other and with the external environment, are the elements from which to explain the different performances of capitalisms. There are five areas of coordination in which firms develop strategic relations: industrial relations, vocational training and education, corporate governance, inter-firm relations and coordination with workers. The firm is conceived as a relational entity and as such operates in national contexts where the regulation of these institutional arenas is closely intertwined with the model of capitalism. The diversity of capitalisms does not consider structural factors or the determinants of labour demand. All attention is focused on the supply of labour and the choices made by firms in the face of external pressures (globalisation) that are fixed and unchangeable. If this is the case, it is from the different institutional arrangements that firms derive competitive advantages (or disadvantages) in adapting to the pressures of globalisation. A key concept in this framework is that of 'institutional complementarities'. In the variety of capitalisms approach, two institutions are complementary if the presence (or efficiency) of one increases the returns (or efficiency) of the other. It follows that if a particular coordination mechanism is adopted in one institutional sphere, it will tend to dominate and be reproduced in other spheres, so that the mechanism is reinforced overall. Given these characteristics, there are two dominant models of capitalism: coordinated market economies (CMEs) and non-coordinated market economies (LMEs). In the context of CMEs, regulatory authority is vested in collaborative mechanisms between economic actors, namely companies and representative organisations. The market space is shaped or at least influenced by public institutions that retain a certain degree of authority. In these economies, which are typical of continental and northern European countries, the relevant institutions are those that facilitate coordination between companies over long-term time horizons. These institutions include strong trade union and employers' organisations that are oriented towards developing collaborative (rather than conflictual) relations. Additionally, there is a dense network of public institutions that support the link between training and work, the competitiveness of companies, and the safeguarding of social cohesion. The participatory orientation of industrial relations facilitates the sharing of information and collaboration in the context of corporate governance (Hall and Soskice 2001). This phenomenon has been described by scholars as a form of beneficial constraint (Streeck 1997), whereby institutions limit the unilateral power of employers, yet ultimately yield positive outcomes for the companies themselves. A case in point is the codetermination system in Germany, which constrains the freedom of employers to restructure companies by obliging them to share information and consult with employee representatives. The effect of this restriction, as Streeck (ibid.) argues, has been to encourage the development of long-term cooperative relationships between German employers and their employees. This, in turn, has provided the basis for competition based on improving the quality of work and the added value of production. By fostering stable labour relations, it is more cost-effective to invest in training and to involve workers in the enterprise's operational dynamics. In conclusion, with regard to the financial, here, too, we are faced with a system that tends to be more cooperative and long-term oriented, thanks to the predominant role of the banking circuit, partly because of the strong interlocking of large banks and large firms in long-term projects. The second macro model highlighted in this literature is that of liberal market economies (LME). In these economies, which are typical of the Anglo-Saxon context, the market is the main regulatory mechanism, and relations between firms and the external environment are mediated by strong competitive mechanisms, with little influence from the state. Firms are less subject to institutional constraints, and beneficial constraints. Supply and demand structure the environment in which firms operate. Financing also follows market channels, especially financial ones, while the banking channel is in the minority, with no presence of banking institutions in the capital of enterprises. In this model, the ownership structure is fragmented between shareholders who pursue a short-term and immediate profit-oriented policy. In the area of vocational training, it is the enterprise that drives the creation of the skills needed to meet the (short-term) demands of the market and shareholders. But the less long-term orientation of firms and investment does not mean less capacity for innovation. If there is little cooperation between the actors in industrial relations, and in the absence of constraints that encourage cooperation and mutual recognition between the social partners, then innovation is driven by the market and by firms, which have wide scope to hire and fire and to allocate resources where the (short-term) return is highest. In such an environment, innovation processes follow typical paths of Schumpeterian creative destruction. This approach is characterised by a preference for the continuous turnover of actors and sectors in which the engines of growth are activated. In coordinated capitalism, growth occurs at a slower pace through gradual processes and is firmly anchored in specific core sectors. Conversely, in uncoordinated economies, dynamism is greater but accompanied by higher inequality and fewer labour protections. From an economic performance perspective, the two models are not hierarchically ordered. Both models are distinguished by institutional complexities that engender competitive advantages contingent upon the strategic orientations and market positioning of firms in the global marketplace.

This model has also been the subject of criticism, in response to stresses that the authors of the Voice of Capital theory themselves had identified. The variety of capitalisms describes static models, but above all fails to acknowledge the presence of hybrid models, which cannot be ascribed to either one or the other model (Crouch 2005, Amable 2003, Schmidt 2002, Molina, Rhodes 2007). There are indeed non-paradigmatic cases that do not fit into Hall and Soskice's scheme. Although they acknowledge the existence of 'ambiguous' models, such as France, Italy or Spain, they do not go so far as to identify a plurality of models. But it is precisely on this ground that comparative political economy studies have reacted by proposing a greater articulation of the VoC model. One such proposal is that put forth by Hancké, Rhodes and Thatcher (2007), which introduces a more explicit reference to the role of the state within the comparative frame. This is not simply as a facilitator of interlocking, but rather as an actor that effectively directs and regulates the economy. Molina and Rhodes suggest that mixed economies exhibit a greater degree of similarity than previously assumed. Three typologies thus emerge from this configuration, two of which (LMEs and CMEs) can be traced back to the variety of capitalisms and the third as a mixed or spurious model called Mixed Market Economies (MMEs). They challenge the notion that mixed economies represent a sub-model of the coordinated model or a standalone phenomenon who do not fall into either of the two dominant types. They belong to a third category, characterized by an active state that continues to play a role in the economy, either in a compensatory manner (as in Italy or Spain) or with a more interventionist approach, as in France. Moreover, these countries (particularly Italy and Spain) are distinguished by the presence of systems of small and medium-sized enterprises that do not conform to the typical organizational structure of large industrial conglomerates found in Coordinated Market Economies (CMEs) yet are still capable of leveraging institutional frameworks to generate competitive advantages. Molina and Rhodes emphasize that Italy and Spain exhibit a hybrid form of capitalism, distinct from both the Anglo-Saxon liberal market model and the coordinated market economies of Northern Europe. Their "Mixed Market Economies" (MMEs) reflect unique institutional arrangements characterized by fragmented welfare systems, dual labor markets, and significant state intervention, with strong regional influences.

A wide strand of research has highlighted the limits of applying the standard models of the Varieties of Capitalism (VoC) to the economies of Southern Europe. Donatiello, Ramella 2017 offer a refined and updated framework, focusing on the specific traits of the National Innovation Systems (NIS) in Italy, Spain, and Portugal. These countries, commonly classified as “Moderate Innovators” in the European Innovation Scoreboard, are not simply backward versions of Coordinated Market Economies (CME) or Liberal Market Economies (LME). On the contrary, they display a structurally distinct configuration that justifies an autonomous categorization within the literature on comparative political economy. Their systems of innovation are defined by chronic underinvestment in R&D, weak coordination between firms and research institutions, and pervasive fragmentation both in the productive and institutional spheres. Despite this institutional weakness, a paradox emerges: during the economic crisis of 2008–2014, these countries, especially Italy, showed a surprisingly solid innovative performance among their SMEs. This “Southern European Innovation Paradox” (Donatiello, Ramella 2017) reveals that, even in the absence of robust formal institutions, firms pursued product and process innovations through alternative paths. Donatiello and Ramella trace this back to a model of incremental innovation, based on learning by doing, learning by using, and learning by interacting, typical of industrial districts and territorially rooted productive systems. Unlike radical and scientific innovation, which strongly depends on formal R&D infrastructures, these mechanisms thrive in local contexts where tacit knowledge and experiential adaptations prevail. These results have significant implications for interpreting the evolution of platform capitalism in Southern Europe. The empirical weakness of collective coordination mechanisms and the underdeveloped nature of public–private linkages create a terrain where digital platforms can exploit regulatory gaps and institutional inertia to replicate standardized business models. At the same time, the territorial logics of innovation and the adaptability at the firm level observed in Italy suggest that some platforms may become locally rooted and adopt hybrid strategies, especially in the absence of state-led innovation frameworks. The contribution of Donatiello and Ramella supports an interpretation of Southern European capitalism as a hybrid regime, not simply falling behind, but structurally distinct, characterized by empirical and fragmented innovative processes and by limited institutional complementarities. Their analysis integrates the reading based on Mixed Market Economies (MMEs), offering post-crisis empirical grounding and highlighting both the constraints and the adaptive capacities in the Italian and Spanish contexts. The authors describe the long-term trajectory of these countries as a “low road to competitiveness,” (Donatiello, Ramella 2017) in which cost containment and labor market flexibility have replaced investments in human capital or research infrastructures. This trajectory predates the 2008 crisis and lies at the root of persistent productivity gaps. Finally, the article highlights significant divergences between Italy and Spain that justify a comparative approach within the same regime. Italy possesses a much stronger manufacturing base, with employment in medium-high and high technology sectors amounting to 33.3 percent in 2015—close to the EU average of 37.2 percent. Spain, instead, is more specialized in low-tech services and construction. The pre-crisis boom in Spain was driven by the real estate sector and credit expansion, while the Italian industrial fabric remained more stable. As a result, Spain experienced a sharper contraction in investment and employment during the crisis, including innovation- related areas. Overall, these results support a vision of Southern European capitalism as institutionally fragmented, structurally underfunded, but still capable of fostering innovation through localized and adaptive mechanisms. They challenge deterministic models of convergence and emphasize the importance of considering both institutional weaknesses and firm-level agency when analyzing the diversity of capitalisms. This interpretative framework also makes it possible to account for the variety of effects produced by digital platforms within the same economic sectors in Italy and Spain. As shown by Burroni, Pavolini, and Regini 2022, despite sharing an institutional matrix broadly associated with Mediterranean capitalism, the two countries have followed divergent trajectories of adaptation, shaped by the interaction between state intervention, labour market regulatory arrangements, and the organizational capacities of local actors. Within this context, platforms do not merely impose standardized business models but interact, as we will see, selectively with fragmented institutional environments, generating differentiated outcomes in terms of labour regulation, firm strategies, and forms of sectoral coordination. The diversity of effects observable within the same sectors—such as food delivery or ride hailing in the two countries —thus reflects not a simple convergence towards a single model of platform capitalism, but rather the emergence of hybrid configurations, shaped by the specific national and sub-national trajectories of Mediterranean capitalist systems (Burroni, Pavolini, Regini 2022).

## DO VARIETIES OF PLATFORM CAPITALISM EXIST?

The discourse surrounding digital platforms often portrays them as a novel and exceptional form of enterprise, marking a distinct phase in the evolution of capitalism. A dominant perspective within this debate (Schüßler et al. 2021) argues that digital platforms leverage network effects to establish monopolies, thereby gaining significant political influence and circumventing regulatory frameworks. Driven by venture capital, these platforms are seen as deploying a standardized business model across various countries and sectors, displacing competitors and bypassing traditional regulatory mechanisms to reshape economies (Srnicek 2017; Kenney et al. 2021; Wood, Lehdonvirta 2021; Steinberg 2022). This viewpoint builds on seminal studies that project the future trajectory of capitalist economies based on empirical observations of a few pioneering plarforms, primarily in the United States (Kenney, Zysman 2016; Collier et al. 2018; Cusumano et al. 2019). Platforms, such as Uber and Deliveroo, have been central to analyses of platform capitalism, largely due to their reliance on self-employed labor to deliver location-based services (Ametowobla, Kirchner 2023). Uber's disruption and deregulation of the U.S. taxi industry (Collier et al., 2018) have bolstered expectations that platforms will evolve into monopolistic entities (Rahman, Thelen, 2019 ; Seidl 2020). However, this perspective, which frames platforms as inevitable monopolistic singularities, disconnects discussions of platform capitalism from broader theories on the variety of capitalist economies. Economic sociology offers a more nuanced understanding of markets as emergent from the relationships firms establish with one another (Swedberg 2005). In these markets, firms compete for dominance based on the strategic models guiding their actions, which termed "competing conceptions of control" (Fligstein 2001). Comparative capitalism research further emphasizes that market activities are shaped by institutional frameworks that vary significantly across national contexts (Streeck 1991; Fligstein 2001). These institutional regimes foster certain models while constraining others, leading to considerable cross-national diversity in capitalist systems. Drawing on this literature, economic sociology challenges the assumption of a uniform platform model across countries.

Case studies of digital platforms beyond the usual focus on pioneering companies in North America reveal significant deviations from the standard self-employment-based model. Research on both flagship platforms (Drahokoupil, Piasna 2019; Mika, Polkowska 2022; Bergamante et al. 2022) and lesser-known platforms (Heiland 2020; Lei 2021; Johnston et al. 2023) shows the existence of alternative models that employ workers or subcontractors, challenging the notion of platform singularity. Furthermore, cross-national comparisons suggest that some platforms adjust their business models to mitigate political or regulatory pressures (Thelen 2018; Ilsøe, Söderqvist 2022; Muszyński et al. 2022; Koutsimpogiorgos et al. 2023 Ciarini, De Minicis 2024). While these case studies underscore the existence of diverse platform models, there is a notable gap in the literature: a comprehensive empirical overview is lacking. Current research does not establish whether these deviations represent isolated cases or reflect broader, systematic patterns of diversity across countries. This gap calls for further investigation into the extent of diversity within platform capitalism. To address this shortcoming, it is necessary to contrast the dominant view of platform capitalism as a uniform model with alternative perspectives grounded in economic sociology (De Minicis, Launde 2021). These perspectives suggest that competition and comparative capitalism are essential for understanding the diversity of platform models. Based on this theoretical framework, we can formulate expectations about the patterns of diversity likely to emerge across different national contexts and empirically test these expectations by examining lean platforms in Europe, particularly in Italy and Spain—two key regions in the current debate. According to comparative capitalism theory, platform companies must navigate national regimes that either enable or constrain their business models. We expect that broad regime types will shape competition between platforms, leading to low diversity within individual regimes but high diversity across different regimes. In lightly regulated regimes, market-oriented models like Uber's should dominate, while more coordinated regimes may increase alternative platform models. From this perspective, findings from studies of North American platforms cannot be generalized globally, as national institutional frameworks create distinct market conditions that allow platform companies to adopt varying strategies to establish or maintain their market positions. Diversity concerning the structure of the enterprise, financing, types of contractual arrangements, forms of worker compensation, and relationships with trade unions and institutional actors constitutes a key area of investigation. Another important aspect to examine is whether this differentiation from the convergent model is genuine or merely tactical. Specifically, whether the presumed variety in platform models, shaped by relational constraints within different contexts, results in a substantive transformation of the organizational nature of platform capitalism, or if it is simply a strategic disguise to access various markets while leaving the fundamental characteristics of the pioneering platform model intact. Additionally, it is important to understand if the influence of contextual factors is genuine and, if so, which aspects of the nature and functioning of platform economies are affected. Some features of the platform model, as observed in its development (Cusumano 2019; Steinberg 2022), are fundamental and thus impermeable to the relational forms of different economic contexts, while others may vary depending on interactions with other businesses and institutional and social actors. Another critical factor to consider is the particular relationship between platform enterprises and other types of firms, including competitors, in the contexts where they operate. Platforms are not only competitive entities for traditional businesses but also serve as instruments of innovation and growth of other firms. This dynamic may lead to alterations in the traditional competitive and relational forms among firms in international contexts. The addition of this study will address these issues by assessing whether a genuine variety of platform capitalisms exists, classifiable within the proposed models, or if the observed diversifications are merely superficial, with no substantial alteration to the pioneering model. This analysis will focus on platform capitalism in location-based services within two national contexts, Spain and Italy, investigating whether these digital business forms align with the economic relational frameworks characteristic of Molina and Rhodes' classification of Mediterranean Market Economies (MMEs). In particular, the model proposed by Molina and Rhodes is compelling as it applies the tools of the Varieties of Capitalism (VoC) framework to explain how coordination mechanisms between market and non-market elements operate and evolve, emphasizing the relationship between production regimes and welfare systems, the wage-labor nexus, and employment protection. The MME theory is especially pertinent for interpreting the interaction of platform capitalism in local contexts, as it explores whether "market liberalization" and the redefinition of the state's role signify a shift of MME economies towards the Liberal Market Economy (LME) model, or towards new forms of coordination designed to manage "market liberalization" and state withdrawal with new regulatory frameworks. A crucial element in understanding how platform capitalism responds to mixed market economic systems is the role it plays in adjusting wage levels and social security, and how social and labor market policies interact, either aligning towards coordinated approaches or diverging asymmetrically, creating perverse incentives for economic actors. In line with the core insights of the VoC framework, updated in the context of mixed economies, social protection regimes, production systems, and labor market regulation should be interconnected in ways that enhance firm performance and the overall efficiency of the national economy, thus contributing to comparative institutional advantage (Rhodes 2005). How does platform capitalism confirm or diverge from these trends? These are critical questions in understanding how platform capitalism operates within the relational dimensions governing the wage-labor and labor-social protection nexus (De Minicis 2024).

In this prospective, referring to the two case studies under analysis, Pais, Mori 2023 in their chapter *Towards new forms of economic and political action* explore the rise of innovative models of worker representation in Italy and Spain, focusing on how these models attempt to address the vulnerabilities of contingent and platform-mediated labor. The authors argue that traditional trade unions, built around the standard employment relationship, subordinate, full-time, permanent, and with a single employer, have become increasingly inadequate in accommodating workers whose status is "contingent, engaged in multiple work activities that cross sectoral boundaries". Among these are platform workers, freelancers, click workers, and those employed with intermittent o precarious contracts. The union model based on collective bargaining has proven particularly unsuitable for protecting these groups, who often lack a stable workplace, a clear occupational classification, or eligibility for standard protections. A central theme of the author's work is the lack of access to social protections among these workers. Their legal and institutional marginality partly derives from "intermittent contracts, also operating through platforms, engaged in different sectors at the same time with different contracts that allow them to access multiple forms of small and temporary protections" (Pais, Mori 2023). Several initiatives attempt to address this gap through legal innovations. For example, Doc Servizi in Italy applies an "intermittent contract to all its worker-members," ensuring income continuity and access to social protections, while the employer network Humus uses a "network contract" to help seasonal workers accumulate enough working days to qualify for unemployment benefits. Meanwhile in Spain, Riders x Derechos and Tu Respuesta Sindical YA! adopt legal conflict as a key strategy, pursuing lawsuits against platforms for false self-employment practices. The authors identify three critical tensions in these new practices. First, there is the issue of localism: many initiatives are deeply rooted in local contexts, which makes it difficult to transfer them to other territories and organizations. In the absence of local institutional entrepreneurs capable of translating needs into collective action, these experiments risk remaining confined and failing to expand. Second, alliances between new movements and traditional trade unions can generate jurisdictional conflicts, especially when collaboration evolves into competition for legitimacy in formal arenas of social dialogue. Third, there is the risk of symbolic rather than transformative changes: entry initiatives often act as affirmative processes without producing structural transformation, while union initiatives may incorporate contingent workers into pre-existing categories that are inadequate to represent their specific conditions.

From a social analysis perspective, it is also necessary to consider the link between the level of unionization and the level of solidarity that may arise within these business models. In their comparative analysis of the mobilization of food delivery couriers in Italy and the United Kingdom, Tassinari and Maccarrone 2020 explore how solidarity can emerge "against the odds" within the structurally adverse conditions of the platform economy. Drawing on labour process theory, the authors argue that, although the organizational model of platforms is characterized by individualization, algorithmic control, and spatial dispersion, these very conditions produce internal contradictions that can catalyze solidarity and collective action. Contrary to expectations rooted in traditional industrial relations theory, platform-mediated work is not inherently incapable of generating collective identity or mobilization. On the contrary, solidarity can arise from shared claims and antagonisms experienced in the course of everyday work, particularly when mediated by workers' agency practices. The article focuses on two emblematic cases of mobilization: Deliveroo riders in London and Brighton, and Foodora riders in Turin. In both contexts, riders reacted to unilateral changes in payment systems by organizing spontaneous protests. Solidarity also emerged through consciousness forged in action. Taking part in protests strengthened collective identity among workers and redefined their self-perception as workers rather than as independent entrepreneurs. Protesters used uniforms and platform-branded equipment as symbols of contestation, thereby subverting the corporate narrative of flexibility and autonomy. These framing practices (Hyman 1999; Simms 2012) contributed to shifting public perception and media coverage in ways that validated the workers' experience of exploitation. The authors warn against considering the absence of formal unionization as the absence of solidarity. On the contrary, they stress the importance of recognizing alternative forms of organization, especially those rooted in informal, digital, or bottom-up structures. This is particularly relevant in Italy, where traditional unions were largely absent, but mobilization nonetheless occurred through self-organized collectives. The authors conclude that the mobilization of gig workers reflects not only a challenge to managerial control but also a redefinition of the forms that solidarity and collective action can take in the platform era.

The platform economy is shaped by local institutional complementarities, whereby the efficiency of one institution is enhanced through its interaction with another, or it accelerates a misalignment, creating asymmetries among these dimensions with an attitude of impermeability to local conditions? Understanding whether platform enterprises adapt genuinely or tactically to the local constraints of mixed capitalist economies is therefore essential to grasp the future trajectory of hybrid capitalist models. In this regard, the regulatory frameworks implemented in the two countries classified as Mixed Market Economies (MMEs), and particularly the response of platform enterprises to these institutional pressures, can reveal whether platform capitalism really adapts to the local contexts in which it operates. Moreover, the different regulatory paths and the reactions of platforms to these frameworks also highlight differences between the two MME models, specifically Italy and Spain, not only in terms of platform capitalism but also with respect to the role and nature of the institutional and social actors involved in these regulatory relationship dynamics (Martin et al. 2020). This analysis aims to highlight the evolution over time, in relation to the political, economic, and social changes that have occurred in the two countries under consideration, of the indicators identified by Molina and Rhodes in 2007 for the classification of mediterranean hybrid Western capitalist models.

THE IMPACT OF FOOD DELIVERY PLATFORM'S REGULATORY DYNAMICS ON MME' S VOC MODELS IN ITALY AND SPAIN

By studying the configuration of food delivery platforms in Italy and Spain, we observe significant interactions between local regulatory frameworks and the operational practices of these companies. According to Molina and Rhodes, the Mediterranean Market Economy (MME) model is characterized by rigid employment contracts, localized sources of finance, fragmented union influence, and a strong role of the state. By contrast, the Liberal Market Economy (LME) model is marked by flexible contracts, significant reliance on venture capital, weaker union presence, and minimal state intervention. In Italy, regulatory approaches to food delivery platforms have been relatively weak, with the state deferring to collective bargaining on the crucial issue of worker classification. This opened the way to a typical platform strategy «move fast and change the system» resulting in a collective agreement negotiated with a single union of limited representativeness, thereby excluding the main confederal trade unions. The employer association thus bypassed traditional labor representation, and this relational dynamic failed to generate any substantial change in the platforms' organizational identity. Instead, platforms quickly exploited institutional loopholes and the underrepresentation of riders within traditional union structures. The controversial UGL–Assodelivery agreement[1] epitomizes these relational tensions, illustrating how platforms seek to institutionalize atypical work models aligned with their identity, paradoxically through collective bargaining mechanisms that are supposed to embody stronger forms of regulation and worker participation.

The strategy pursued by platforms in shaping regulatory frameworks has therefore triggered conflict with excluded actors who demanded the extension of standard employee rights. As noted, this strategy thrived on the weak representation of fragmented segments of the labor market, as well as on the absence of clear institutional positions. Italian legislation intervened in a partial and ambiguous way: Law no. 128/2019 introduced minimal protections for riders but left unresolved the central issue of their legal classification. Attempts to move toward a stricter definition, through intermediate categories such as "etero-organizzazione" (hetero-organization) were deferred to collective bargaining, producing the already-mentioned outcomes. The net result was the reaffirmation of the platforms' self-representation as digital intermediaries, concealing their infrastructural nature and positioning riders as external, intermediated actors. At the level of collective agreements, this dynamic reflected a lack of permeability of food delivery platforms to local worker representation.

A partial exception emerged in 2021, when Just Eat signed an agreement with the main confederal unions Nidil-Cgil, Felsa-Cisl, and Uiltemp-Uil. The deal introduced open-ended part-time employment contracts for riders, under the national collective agreement for Logistics, Freight Transport and Shipping. While this represented a significant step toward formal employment regulation, it concerned only a minority of riders and maintained piecework elements such as delivery-based bonuses and hourly adjustments. Moreover, riders frequently work across multiple platforms, resulting in de facto multi-employer and fragmented work patterns. Hence, even under an innovative collective framework, the actual labor process remains embedded within the broader platform economy's reliance on flexibility, autonomy, and

[1] The collective agreement signed in October 2020 between Assodelivery (the association of the main food delivery platforms in Italy, including Glovo, Deliveroo, Uber Eats, and initially Just Eat) and the UGL Riders union was the first European attempt to regulate riders' work through sectoral bargaining. While formally providing a contractual framework, it maintained riders in the category of self-employed rather than employees, with piece-rate rather than hourly pay. The agreement, which set a minimum of €10 gross per hour of availability (only if at least one delivery was made) and a 10% supplement for night or adverse-weather work, was widely criticized by the confederal unions (CGIL, CISL, UIL) and the Ministry of Labour for circumventing recent legislative reforms aimed at extending protections. It thus reinforced riders' position in the grey zone of dependent self-employment.

infrastructural opacity. Platforms in Italy therefore moved rapidly to consolidate their presence, leveraging weak representation and fragmented regulatory capacity to reproduce their original identity and secure rapid valorization of capital, most notably through network effects.

By contrast, the Spanish case has been defined by direct state intervention. With Law 12/2021—the "Rider Law", the legislature presumed the subordination of delivery workers, classifying them as employees and imposing clear obligations on platforms regarding rights, social security, and collective representation. This legal framework consolidated labor protections, subjected platforms to closer supervision, and formally recognized their entrepreneurial and employer nature. The reform was not an isolated measure but part of a broader reconfiguration of the Spanish labor market, culminating in Law 3/2021 and the 2021–22 labor reform promoted by Minister Yolanda Díaz. These reforms aimed to reduce segmentation and precariousness by limiting temporary contracts and strengthening sectoral collective bargaining. Regulation of platform work was thus integrated into an organic strategy to rebalance power between capital and labor, reinforcing the state's compensatory role typical of MMEs when collective actors are weak.

The Spanish approach, which differs from the Italian case, is also determined by the labor market reform introduced in Spain between 2021 and 2022, which represents a significant institutional development within the broader configuration of Mediterranean welfare regimes. The reform was the result of a tripartite social dialogue between the government, the main trade unions (CCOO and UGT), and employers' associations (CEOE and CEPYME), and is aimed at addressing the chronic segmentation of the Spanish labor market. Historically, Spain has been characterized by one of the highest rates of temporary employment in the EU, a condition that has aggravated volatility and social vulnerability during economic crises. The legitimacy of the reform, based on a negotiated agreement and not imposed unilaterally, represents a rare case of coordinated institutional action in an MME context. In addition to reducing precariousness, the reform is presented as a step towards convergence with the labor market models of Northern and Continental Europe. It incorporates elements recalling the German dual training system, French dismissal regulation, and Dutch flexicurity, while maintaining national specificities such as strong familism and a residual-type welfare system. This suggests that institutional convergence and regime-specific adaptation can coexist, offering an alternative trajectory for MMEs seeking to strengthen employment protections without abandoning flexibility. The reform also aimed to reinforce collective bargaining by reversing previous trends towards decentralization. The principle of "wage priority at company level" was abolished, restoring sectoral agreements as the main reference point for wage setting. This move returned institutional capacity to trade unions and employers' associations as collective regulatory actors, countering the erosion of wage standards resulting from the excessive autonomy of company-level bargaining. This stands in sharp contrast with the Italian case, where decentralized bargaining structures remain prevalent and sectoral coordination is weak or fragmented.

Spanish platforms were forced to adapt their business models to these new regulations, which also involved a more structured occupational framework and the active participation of unions in the design of legislation. Employer associations supported the reform, while platforms strongly opposed it, claiming unfair competition rules in comparison with traditional firms that bore higher labor costs. These dynamics illustrate the contrasting responses of Italy and Spain: while Italy relied on collective bargaining in a fragmented context of weak representation, Spain pursued binding legislation that reshaped the very identity of platforms.

The Italian case highlights how the conventional industrial relations framework struggled to shape platform capitalism. Trade unions privileged collective bargaining over legislation in the 2018 tripartite table convened by Minister Luigi Di Maio, inadvertently leaving space for unilateral platform strategies. This reflects the structural features of MMEs, where unions remain powerful in traditional sectors and

public administration but display limited presence in fragmented labor markets shaped by digitalization. In this sense, the Italian regulatory trajectory demonstrates the persistence of platform economy pioneering traits and the weakening of local institutional conditioning. Spain, in contrast, adopted a more pragmatic approach: recognizing the limits of union power in platform work, it deployed legislation that directly constrained platforms' organizational identity. This reflects Molina and Rhodes' argument that pervasive state intervention in MMEs compensates for the inability of socio-economic actors to autonomously provide collective goods.
Nevertheless, even in Spain, platforms resisted. Some adapted, but others—most notably Glovo—openly defied the Rider Law, continuing to treat riders as self-employed and preferring to absorb financial penalties rather than abandon their identity. In 2022, the Ministry of Labor fined Glovo €79 million for systematic reliance on false self-employment. The firm defended its "hybrid model," claiming compliance with EU law, yet ongoing litigation revealed persistent tension. Both in Italy and Spain, migrant riders—often with residence permits—became central to platform labor forces. Their weaker bargaining position and reliance on ethnic networks facilitated informal redistribution of accounts, shifts, and tools, further complicating the reach of formal regulation Tab.1

Table 1: *A comparative examines for both Spain and Italy in 2023, including the total number of riders, the percentage of migrant riders with residence permits, and the breakdown by employment status (employee, self-employed, or hired via intermediary companies).*

| Platform | Country | Estimated Number of Riders (at least one task in the last month) | Percentage with Residence Permit | Type of Contract | Percentage from Intermediaries |
|---|---|---|---|---|---|
| Glovo | Italy | ~15,000 | ~60% | self-employed worker | ~5-10% |
| Glovo | Spain | ~25,000 | ~75% | self-employed worker (under legal challenge) | ~5-10% |
| Deliveroo | Italy | ~13.000 | ~50% | self-employed worker | ~5-10% |
| Just Eat | Italy | ~4,000 | ~65% | Dependent part-time (fixed-term or permanent) | ~5% |
| Just Eat | Spain | ~18,000 | ~80% | Dependent (Law Rider 2021) | ~5% |
| Uber Eats | Spain | ~8,000 | ~70% | Dependent (Law Rider 2021) | ~5% |

*Source: Author's elaboration on Inapp WP 2024; Glovo, Justeat, Deliveroo reports 2023.*

Overall, these cases demonstrate that, despite regulatory interventions of varying intensity, food delivery platform work in both countries remains difficult to stabilize within the standard categories of labor markets. Platforms continue to preserve their original traits or adopt minimal adaptations, revealing the difficulty of reconciling platform capitalism with Mediterranean institutional contexts. These dynamics test both the strength of industrial relations systems and the inclination of governments to act politically. The degree of permeability of states to platform business thus depends on two factors: pre-existing institutional and social frameworks, as theorized by Molina and Rhodes, and current political contexts, which determine governments' willingness to mobilize those frameworks. The interaction between capacity and willingness is dynamic, conflictual, and evolving, ultimately shaping the regulatory response of each country and the extent to which platforms are compelled to adapt.

## THE UBER CASE

A specific case is the relationship between ride-hailing platforms such as Uber and the institutional contexts of Italy and Spain. Unlike food delivery platforms, the interaction with social actors here—

limited to the field of industrial relations—assumes distinct dynamics and characteristics. More broadly, the arrival of Uber illustrates how platform capitalism in passenger transport generates highly divergent local impacts. While some national contexts responded with regulatory openness, others reacted with immediate and restrictive bans, often triggered by the conflictual mobilization of incumbent social actors. An examination of Uber's expansion shows that institutional arrangements across political economies do not merely channel the same conflict in distinctive ways. Rather, they translate seemingly common trends into entirely different problems in divergent national settings. These differences matter, as the regulatory "flashpoints" provoked by Uber mobilize different actors, foster the formation of different coalitions, and shape the very terms in which conflicts around the platform are framed and contested (Thelen 2018).
In the Spanish framework Uber initially entered the market in 2014, operating in a regulatory grey area. Through its UberPop service, like the US UberX model, the company allowed unlicensed drivers to transport passengers, a peer-to-peer service. The platform presented itself not as an employer or a transport company but as a mere digital intermediary, thereby obscuring one of its dual identities (intermediary ann productive infrastructure) Cusumano et al. 2019. This dynamic of rapid market entry with its original form and scale immediately provoked widespread opposition from traditional taxi associations and legal challenges that reached the European Court of Justice. This initiated a contentious legal saga for Uber in Spain, commencing in December 2014 when the Madrid Commercial Court, ruling on a petition from the taxi association, ordered the precautionary suspension of the UberPop service. The court found the activity violated national transport regulations due to the lack of an administrative license. This initial judicial intervention was, however, controversial, confounding social and institutional actors who, constrained by the platform's dual nature, struggled to define the legal status of digital platforms, oscillating between classifying them as mere technological intermediaries and as economic operators subject to sector-specific regulation (productive infrastructure).
The matter was subsequently brought before the Court of Justice of the European Union (CJEU). In its landmark and highly contentious ruling of 20 December 2017 (Case C-434/15, *Asociación Profesional Elite Taxi v Uber Systems Spain*), the Court established a crucial precedent in the relationship between platforms and pre-existing social, economic, and institutional market actors (Hacker 2018). The court emphasized that Uber exerted a "decisive influence" on the drivers' activities—selecting them, setting fares, managing payments, and monitoring service quality—and that, therefore, the platform could not be qualified as a simple digital intermediary. Instead, it was to be considered a specific infrastructure, namely one for the provision of passenger transport services (Sieradzka 2020). The consequences for UberPop were significant: its activity did not fall under information society services (digital intermediation) and thus did not benefit from the protections of the E-Commerce Directive or the Services Directive. Furthermore, it could not invoke the freedom to provide services under Articles 56 and 58 of the Treaty on the Functioning of the European Union (TFEU) but fell under the regulatory framework for transport (Articles 90 et seq. TFEU). This meant Member States were legitimized to regulate UberPop in the same manner as taxi companies, imposing licenses and stringent regulations.
The dispute revealed how the platformization of the transport sector in Spain did not occur in an institutional vacuum but collided with specific institutional, social, and economic structures that impacted its original market dynamics. In contexts like Spain's—characteristic of the Mediterranean capitalism described by Molina and Rhodes (2007), marked by a strong state role and influence of organized interests, albeit within fragmented labour markets—the emergence of UberPop produced a clash between global platform logics and local institutional specificities. The 2017 ruling crystallized the principle that digital platforms, when exercising substantial control (decisive influence) over an economic activity, must be treated as fully integrated enterprises within sectoral regulatory regimes, thereby establishing a foundation for a level playing field between digital and traditional operators. In summary, the Court's

decision elaborated a two-stage test to determine the applicable rules for platforms offering composite services. First, whether the platform exercised decisive influence/control over multiple components of the service and if these were intrinsically linked by the platform itself, necessitating their consideration as a single, overall service. Second, the principal component of that service determines the applicable legal regime, in this case, the infrastructural component. For platforms combining digital intermediation with a highly developed organizational infrastructure, the prevailing component will generally be identified as the latter. The platform thus loses its ability, in its relational dynamics with local contexts, to conceal its employer-like nature that *realizes* and not merely *intermediates* a service. This dimension differs from platforms like eBay (and, by extension, hotel or flight booking platforms like Booking), where the Court had recognized that the principal activity consisted of mere electronic intermediation between supply and demand, without substantial interference in the organization of the underlying service by their infrastructures. Here, the information service was economically autonomous from the good or service exchanged, the seller and buyer remained the parties defining the transaction's content, while the platform merely facilitated their meeting; the infrastructural element remained more nuanced, relegated to efficient intermediation without realizing significant forms of service organization and control. Conversely, in the UberPop case, both the Madrid Court (2014) and the CJEU (2017) found that the platform's activity could not be reduced to a neutral intermediary function. Uber exerted decisive influence over the transport service, determined fares, controlled market access through its application and rating system, and conditioned driver conduct via algorithms and ratings. The legal consequence of this first relational clash between Uber and the social and institutional forms present in Spanish territory was the reclassification of Uber not as an information society service, but as a genuine urban transport service, subject to national and local regulations, leading to the end of the peer-to-peer service and, consequently, UberPop. This marked the beginning of stricter regulatory oversight. Uber ceased its unlicensed operations and temporarily exited the Spanish market. However, the platform's strategy of *asking for forgiveness rather than permission* led to a change in strategy. Conditioned by the initial reaction of local social actors, it adaptively modified its service offering, inaugurating a new form of service defined as UberX, no longer peer-to-peer but employing only drivers with administrative licenses—autonomous drivers or employees of companies or cooperatives—thus formally complying with local regulations while still presenting itself, at least formally, as a mere digital intermediary. Uber uses drivers with licenses provided by companies or individual firms yet inserts them into its own productive infrastructure. In the UberX model, customer requests are processed by a platform-owned server that contacts the nearest vehicle directly and, only in parallel, informs the headquarters of the company that rents the vehicle and manages the license. This procedure formally violates one of the fundamental rules traditionally established for this type of service: returning to the company's base (to which the license is registered) after each ride to receive new orders. This allowed Uber to operate within the regulatory framework governing the private hire vehicle (PHV) sector in Spain, which requires drivers to hold specific licenses known as *Vehículos de Turismo con Conductor* (VTC). Uber, therefore, not only inserted itself into the intermediation and quality of service offered by companies with licensed drivers but also facilitated, economically or administratively, the acquisition of VTC licenses to be used within its infrastructure and intermediation. Thus, drivers can operate through companies whose licenses are held by the company but paid for by Uber with daily payment forms, or as holders of their own license, but always within the platform's infrastructure, which nonetheless controls service quality, provides the technological infrastructure, but bears no legal liability, which remains with the company or the license-holding driver. Performance control is ensured by algorithmic management. A primary instrument of service quality control is the passenger rating system. After each ride, the user can assign a rating (one to five stars) and leave a comment. The platform constantly monitors the average of these ratings; if a driver's satisfaction levels become too low, Uber can intervene with warnings, temporary suspensions, or, in severe cases, permanent exclusion from the platform—a classic dynamic of algorithmic management effect (Srniceck 2017). Alongside user feedback, Uber also employs an algorithmic performance monitoring system that tracks key indicators in real-time, such as response times to ride requests, average call acceptance speed, and routes taken, aiming to prevent unjustified detours or opportunistic behaviour by drivers. Technically, the platform also mandates periodic vehicle checks. Although it does not own the licenses or vehicles, Uber requires cars to meet certain minimum standards of safety, cleanliness, and comfort (e.g., year of registration, number of doors, air conditioning). Conformity is verified through document checks or scheduled audits. Finally, Uber provides drivers with guidelines and training concerning customer service, passenger interaction, and hygiene and safety norms. However, it must be emphasized that this self-regulatory system does not replace public controls: responsibility for NCC regulations and administrative oversight remains with the competent authorities.

In response to this new, only tactically adapted platform strategy, Spanish social and institutional actors responded with taxi driver mobilizations and the introduction of Royal Decree-Law 13/2018, defining stricter requirements for VTC licenses, mandating that new licenses respect a ratio of one VTC for every 30 traditional taxis[2]. The law also granted regional governments the authority to impose further regulations on Uber and other ride-hailing platforms. For example, cities like Barcelona introduced additional restrictions, including the requirement to pre-book Uber rides. Throughout these developments, Uber's capacity to adapt to the evolving Spanish regulatory context drove a constant transformation of its service typology. The regulatory framework in Spain shifted from an initial laissez-faire approach to a formally more regulated landscape, aiming to balance the rights of platform workers, consumer interests, and the protection of traditional taxi services. The role of unions and taxi associations was fundamental in seeking to inhibit Uber's original model. Taxi associations, organized into powerful lobbies, repeatedly mobilized against Uber, organizing protests and strikes that attracted national attention. Their main argument was that Uber and similar platforms engaged in unfair competition by circumventing the stringent regulatory requirements imposed on traditional taxi drivers, such as expensive licenses, safety norms, and fixed pricing models. In the Spanish context, the transition from the period of substantial deregulation of UberPop, declared illegal in 2014, to the current system based on VTC licenses marked a crucial turning point in the regulation of platform-mediated mobility. However, despite strong conditioning from actors already present in the market, the system of license trading by the platform, the exception from returning to a home base for VTC drivers, the ability to intercept and pick up customers directly on the street, coupled with the facilitation of car rentals for the activity offered by the platform itself and a falling cost of licenses, resulted in a relational dynamic for Uber in Spain that, within a differentiated regulatory context, reintroduced the terms of service liberalization and cost reduction present in its initial debut with UberPop. Furthermore, as seen, the Spanish model was characterized by Uber's proactive role in market organization, the platform's insight to acquire VTC licenses from already authorized companies and then lease them to users of its platform allocated a decisive blow to increasing the number of available cars and led to significant market deregulation, with considerable advantages for consumers and significant disadvantages for traditional taxi drivers (De Miguel Molina et.al 2021). For a potential driver, access to the service no longer requires the onerous direct acquisition of a license—which remains a scarce and costly title—but occurs through collaboration with Uber or partner companies that hold a fleet of licenses. The seeking driver must demonstrate legal and professional requirements (license, clean criminal record, psychophysical fitness,



[2] chrome-extension://efaidnbmnnnibpcajpcglclefindmkaj/https://www.cnmc.es/sites/default/files/3845597_0.pdf

specific training), present documentation to the platform, and submit to an internal selection process. Once suitability is verified, Uber assigns the driver a VTC license already in its possession or obtained through agreements with rental companies with drivers, thus allowing activity to commence without the prohibitive initial costs associated with the license. In this sense, the Spanish system represents a "hybrid" model: on one hand, it formally regulates access through the VTC license regime; on the other, it allows digital platforms to concentrate control over their distribution, building a more flexible market that is simultaneously dependent on platform intermediation.

The transition process from the deregulated UberPop model to the current VTC-based system in Spain cannot be understood without considering the accompanying political and social context. Firstly, the organizational and contractual weakness of traditional taxi drivers made it difficult to effectively oppose the expansion of digital platforms in the passenger transport sector. Although protests and union pressure were promoted, they lacked the strength to block the adoption of new intermediation models, especially in cities where transport demand was high and traditional taxi service was insufficient or inflexible. Secondly, the relative slowness and fragmentation of local government action, and the lack of national government centrality on this issue (unlike the rider issue), created a regulatory space favourable for the affirmation of the original dynamics of the platform enterprise.

In the food delivery sector, however, the situation was opposite: the Spanish government intervened rapidly, establishing that riders were presumptively subordinate workers and imposing precise hiring and management obligations on platforms. Regulatory action in food delivery thus limited platform flexibility and strengthened worker protection, creating a stark contrast with the passenger transport sector, where regulation remains more permissive for the reasons highlighted.

Ultimately, the Spanish model shows how the expansion of digital platforms was favoured by a combination of technological innovation, weakness in the traditional sector, and fragmented regulatory intervention in passenger transport, into which the platform inserted itself with a new strategy after the initial stop, reintroducing its natural inclination. In food delivery, a decisive government intervention supported by unions and part of the traditional business sector imposed a stricter institutional framework that evidently conditioned the original nature of the platform enterprise, despite their strong opposition and an initial attempt not to implement the new regulation, in a form of substantive contestation and non-recognition of the local relational and regulatory dynamics in which the platforms were inserted.

In Italy, the regulation of Uber has followed a similarly complex and controversial trajectory, reflecting both the country's protective attitude towards traditional industries and its fragmented regulatory context, but the outcomes have been differentiated. Uber entered the Italian market in 2013, introducing the UberPOP service, which allowed non-professional drivers to provide rides using their personal vehicles. This move triggered immediate resistance from traditional taxi drivers and associations, who argued that Uber was engaging in unfair competition by circumventing the regulatory framework governing the taxi sector. In response to this opposition, Italian courts played a central role in Uber's regulatory challenges. In 2015, a Milan court ruled against UberPOP, deemed it illegal, and ordered its suspension. The court cited violations of Italian transport laws, particularly those requiring professional drivers to hold a specific license, known as *Licenza di Noleggio con Conducente* (NCC), to offer transport services. This marked the beginning of a legal battle that would define Uber's presence in Italy, as regulators and the judiciary adopted an increasingly restrictive approach towards the platform's operations. Following the ban on UberPOP, Uber shifted its strategy in Italy, focusing on services like UberBlack, which employ licensed NCC drivers in compliance with Italian law. However, even these services encountered significant regulatory hurdles. Over time, Italian regional and municipal administrations adopted differing approaches to regulating Uber. While some cities, like Milan and Rome, allowed Uber to continue operating under limited conditions, others imposed severe restrictions, making platform expansion difficult. These local variations reflect Italy's decentralized governance structure, where transport policy is often defined by regional authorities, resulting in a fragmented regulatory landscape.

The lobbying power of Italian taxi associations also played a crucial role in shaping Uber's regulatory context. These associations, such as Uritaxi and Unione Radiotaxi Italiani, staged strikes and protests, exerting significant pressure on politicians to safeguard their sector. The difference in how Uber operates in Spain and Italy stems from the distinct regulatory frameworks governing ride-hailing and transport services in both countries. The Spanish transport market is more liberalized, largely due to the widespread use of *Vehículos de Turismo con Conductor* (VTC) licenses. These licenses allow private hire vehicles (PHVs) to offer transport services, and companies like Uber and Cabify heavily rely on them. The Spanish government sets a national ratio between VTC licenses and taxis, but in some regions, like Madrid, this rule has been applied more loosely, allowing a greater number of Uber drivers and vehicles on the road. This increased supply lowers transport costs and makes the service more accessible, contributing to greater price competitiveness. Furthermore, in Spain, there are fewer restrictions for Uber drivers, allowing greater flexibility for both drivers and platforms (e.g., ability to pick up street-hails, no requirement to return to a base after a ride, lower license costs, less bureaucratic and administrative complexity in obtaining licenses, acquisition of licenses directly by Uber).

In Italy, the regulatory framework is much stricter, particularly concerning traditional taxis versus ride-hailing services. Uber drivers typically operate with *Noleggio con Conducente* (NCC) licenses, designed for pre-booked chauffeur services rather than immediate point-to-point transport. NCC regulations are more restrictive, such as the obligation to return to the operator's base after each ride, limiting Uber's ability to meet demand flexibly. Moreover, the Italian taxi industry is highly regulated with fixed fares, meaning Uber and similar services face greater operational barriers and cannot reduce prices as aggressively. The Italian government has opposed the full liberalization of the transport market due to pressure from powerful taxi unions, leading to a lower number of Uber drivers and higher prices compared to Spain. In Spain, greater competition among VTC license holders (Uber, Cabify, and others) has led to lower prices for passengers. In Italy, stricter regulations result in fewer drivers, reducing competition and keeping prices higher. Italian consumers thus have fewer transport options and higher fares because the ride-hailing market remains more closed. The role of taxi unions and corporatist interests in Italy significantly shaped government policies regarding ride-hailing services like Uber. In Italy, the traditional taxi sector holds considerable political power and has been able to exert strong influence on regulatory decisions. Taxi unions have frequently mobilized to protest the liberalization of the transport market, using strikes and lobbying actions to pressure the government into maintaining stricter controls. This led to legislation preserving the dominance of traditional taxis and imposing limitations on ride-hailing services. In Spain, conversely, there was less effective resistance from the taxi sector, especially in regions like Madrid, where Uber and other VTC platforms could operate more freely. Although taxi unions in Spain also protested Uber, the regulatory framework was more favourable to liberalization. Therefore, Uber in Spain operates closer to its original American model, with greater freedom to set prices and manage its driver fleet without the same level of regulatory burden found in Italy.

In Italy, local factors—including the strength of taxi unions and the government's protectionist attitude—led to the modification of Uber's original operational model, making it less flexible and more constrained. In Spain, despite some regulatory obstacles, Uber has managed to retain more of its original, more liberal model. This divergence highlights how local interests can shape the adaptation of global platforms like Uber to different national contexts. This regulatory difference plays a crucial role in competition and price dynamics: Spain offers a more open market, while the Italian NCC sector remains heavily controlled.

This difference in the interaction with the local context between food delivery and passenger transport platforms in Spain and Italy can be attributed to the different meanings the two institutional contexts attributed to the various platforms. In Spain, food delivery platforms were perceived as having a significant impact on the labour market, provoking a response from the local social and institutional context within a framework aimed at strengthening industrial relations and regulating the labour market and social protection system. This resulted in a symmetrical interaction effect (Streeck 1997) favouring compliance[3]. Conversely, in the passenger transport sector, these platforms were seen as an opportunity to provide more choices for consumers, leading to increased supply and reduced costs, often in open opposition to the taxi corporate structure. Thus, Uber managed to isolate the unpopular taxi monopoly, presenting itself as a champion of consumer choice. The issue was framed in dichotomous terms: "innovation" and "freedom of choice" versus "stifling regulation," aiming to force policymakers to take a position. Furthermore, in Spain, conflicts around Uber played out in decentralized battles, occurring predominantly within municipal councils or state legislative assemblies. In this context, the company managed to exploit (and partly fuel) competition between jurisdictions, leveraging technology to organize its user base and mobilize it politically.

In Italy, as observed, the process was exactly the opposite, reflecting the conditioning characteristics of the local system. In the interaction processes between platform capitalism and local contexts, Italy showed weak union power in the food delivery sector, while a strong corporatist structure was supported by a political-institutional framework in the ride-hailing sector. Unlike in Spain, where competition was articulated at the local level and favoured rapid platform diffusion, in Italy the conflict was quickly directed into administrative and judicial procedures, preventing the self-reinforcing cycle of supply (drivers) and demand (users) growth that elsewhere supported the company's establishment (multi-sided market), even in the absence of a clear regulatory framework. In this context, taxi trade associations played a decisive role, publicly denouncing the platform's rule violations and consolidating a joint front with competent authorities and some political actors in the name of safeguarding legality and existing regulation. In Italy, taxi representative organizations adopted a strategy beyond traditional opposition to Uber's market entry. After an initial phase of radical resistance, which even included creating their own mere intermediation platform, taxi drivers understood that this solution was severely limiting, especially in an increasingly internationalized market. Foreign customers, accustomed to competitive systems characterized by a strong presence of Uber and other transport applications, tended to prefer using Uber Black, despite higher costs, over traditional taxis, perceived as difficult to find. In this context, the main taxi organizations made a decisive choice: to join the Uber service, maintaining their own organization and fares, but accessing demand through the platform's intermediation. This decision also caused an internal divide within the Italian taxi corporations. Today, in the Italian context, Uber not only offers the licensed Uber Black service but also includes traditional taxi drivers, who can operate through the platform during their off-duty hours. Superficially, this adaptation of the platform to the local context seems to mark a condition of strong dependence of the platform on pre-existing institutional and corporatist actors, contributing to reinforcing existing market logics. However, the initial strategies through which Uber aims to overturn this balance and re-propose its identity forms over time are already



[3] In the Spanish food delivery sector, the government's decisive regulatory action—representing a strong institutional force—elicited a response from the platforms. This interaction can be characterized as "symmetrical" because:

- On one hand, the government imposed stringent regulations, such as reclassifying riders as employees.
- On the other hand, trade unions and industry associations—other robust institutional actors—supported this intervention, generating significant social pressure.
- The platforms, while possessing considerable economic and technological leverage, faced a cohesive and potent institutional front.

The symmetrical effect of this interaction meant that the combined strength of Spanish institutions (state and unions) counterbalanced and ultimately surpassed the influence of the platforms. This compelled the latter to achieve compliance—that is, to adhere to the new regulatory framework and integrate riders into the regime of subordinate labour protections.

emerging. Once re-established in the Italian market, the platform-initiated demand-side incentive policies, directly subsidizing part of the ride cost for its intermediated customers. In this way, Uber progressively populates its user base, emptying other channels of access to public transport service and consolidating its role as an increasingly indispensable infrastructural and intermediation employer. Consequently, in perspective, the platform's action does not appear destined to strengthen the pre-existing market and corporatist logics, but rather to progressively impose its identity forms, focused on liberalization, openness, and transformation of the market itself, until it completely incorporates it within its own digital and managerial infrastructure.

## FINDINGS

The analysis conducted confirms that, despite the prevailing trend toward market liberalization and the universalization of platform organizational models, processes of platformization do not yield homogeneous or fully convergent outcomes. On the contrary, digital platforms interact with the institutional, social, and regulatory specificities of national contexts, giving rise to differentiated trajectories and hybrid forms of regulation and organization. From this perspective, at least three main analytical configurations emerge in the cases examined.

1. Autonomous coordination

In this scenario, local social actors are able to influence and reshape the original identity of the platform by relying on pre-existing corporatist and regulatory coordination mechanisms. This is the case of Uber in Italy, where the activity has been progressively channeled into the use of *NCC* (chauffeur-driven rental services) and taxi platforms, thereby incorporating long-standing corporatist logics and reducing the impact of the platform's original model of pure intermediation. Here, the central element is the resilience of traditional institutions, capable of imposing strong constraints on digital innovation.

2. Colonization by the original model

In this case, the platform fully imposes its organizational architecture, redefining entire sectors according to its native logic of intermediation. This is evident in food delivery in Italy or ride-hailing in Spain, where workers continue to be classified as self-employed, and platforms maintain the role of mere digital intermediaries. In doing so, they avoid the recognition of subordinate employment relationships and reconstruct markets according to patterns of competitive deregulation.

3. State substitution

Where social actors are weak or fragmented, the state intervenes as a direct regulator, rebalancing power asymmetries. The paradigmatic example is Spain, where the *Ley Rider* recognized riders as employees, transforming platforms into actual employers and acknowledging their dual identity: technological infrastructures and, at the same time, labor-intensive structures with legal and social responsibilities. These outcomes are inherently temporary and unstable, representing transient configurations within a continual process of negotiation and re-formation. The primary driver of this evolution is the persistent dialectical tension between the inherent logic and identity of the platform—often oriented towards scalability, market disruption, and algorithmic control—and the countervailing pressures exerted by a diverse array of social actors (De Minicis 2019b). The resulting outcomes are therefore never final but are instead provisional equilibria, reflecting a momentary balance of power. The primary driver of this evolution is the persistent dialectical tension between the inherent logic and identity of the platform—

often oriented towards scalability, market disruption, and algorithmic control—and the countervailing pressures exerted by a diverse arrangement of social actors (De Minicis 2019a). These actors, including traditional industries (e.g., taxi associations), labour unions, state regulators, and judicial bodies, actively seek to impose institutional, legal, and social constraints on platform operations. These findings reinforce the hypothesis of a variegated platform capitalism, in which the interaction between global logics and local institutional arrangements produces differentiated and hybrid forms rather than convergence toward a single model. The analysis also highlights the limits of the traditional *Varieties of Capitalism* (VoC) framework in interpreting processes of platformization. The original model, grounded in a functionalist and static perspective, presupposes the stability and complementarity of institutions while adopting a methodological nationalism that tends to overlook conflict, power relations, and the rapidity of transformative processes.

Platform capitalism, in its relational dynamics, is thus characterized by a highly disruptive nature, encapsulated in the motto «move fast and change the system». Platforms seek to impose standardized global organizational logics, but they inevitably clash with institutional, cultural, and regulatory resistance in different local contexts, thereby experimenting with adaptive solutions depending on the strength of social actors present. This generates the need for a more dynamic, conflictual, and multi-level theoretical approach, capable of capturing hybridization processes, asymmetries, and divergent trajectories. Such trajectories can differ within the same country, across distinct markets in which platforms operate, or, in other cases, the same platform within the same market may produce differentiated effects depending on the type and characteristics of the national social context. In conclusion, the analysis demonstrates that while digital platforms tend to impose a uniform global model, their trajectory inevitably collides with local rules, constraints, and resistances, forcing them to constantly renegotiate their adaptive strategies. In this sense, platform capitalism does not evolve in a linear and homogeneous way but rather interacts with national institutional contexts in differentiated manners: at times reinforcing the logics described by the VoC theory and reproducing the typical traits of its reference model, at other times diverging from it and generating diversified configurations of its identity. The result is not a convergence toward a single organizational scheme but a complex and fragmented mosaic of local variants, marked by a continuous conflictual dynamic between the pressure around platform's original identity and the social and institutional resistances that shape its evolution. This perspective opens new avenues for research. It will be crucial to further investigate, on the one hand, the internal variability of platforms themselves and the mechanisms of negotiation between algorithmic governance and institutional regulation (De Minicis 2023); and, on the other, the role of public policies and collective actors in governing hybridization, avoiding uniform regulatory responses and instead privileging contextualized and adaptive solutions. In this sense, platform capitalism constitutes a privileged laboratory for reconsidering theories of the varieties of capitalism, expansion the analytical lens toward new forms of regulation, power, and conflict that characterize the contemporary digital economy.

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## *Appendix: data sources used*

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