



Local commerce for Europe
Wolt EU Manifesto

Wolt

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Wolt's mission is to make cities better by empowering and growing local communities. To do so, we want to make the busy lives of our customers a bit easier, offer local stores and restaurants additional sales and offer flexible earning opportunities for courier partners - and to that end, we operate a local commerce platform, an online marketplace. It's important to us to work closely with policymakers. That's why we are sharing how our business can contribute to making European cities better and also communicating what we need to deliver on our mission.

Our vision for Europe

We believe in a Europe that succeeds from the ground up. Ours is a Europe of villages, rural towns, and, of course, vibrant cities. And we want to think we can play an integral part in helping these communities thrive. The Internet has helped make every economy a global economy and that's why many local merchants now face disadvantages when competing against the world's largest retailers and e-commerce players. For us, local commerce is about giving SMEs, brick-and-mortar stores, and other local businesses the means to level this playing field, and continue servicing their customers and communities better than ever instead of being squeezed out of business, leaving behind hollow city centres and dying towns.

That's why we think it is integral that in the next and following mandates, the EU embraces the opportunities in local commerce. In practice, operating online should be as easy and convenient for small businesses as running their store is. This means simpler and more aligned rules, including opening up of online sales of restricted categories such as medicines. Whilst getting the rules right is important, even more fundamentally, we need to ensure that both innovative companies like Wolt but also the small shops have the people they need.

The EU's labour market is in transition: new skills are needed, many experts are either retiring or pursuing opportunities outside of Europe, and we still haven't quite figured out how to best to support those new to our continent. We need to improve safety nets for flexible work, and we need to make it more easy for talent to move into and within Europe. As long as each Member State optimises just for their own needs, we won't achieve the full potential of the single market - also with regards to labour.

Finally, Europe should find the right balance between innovation and disruption on the one hand, and regulations and safeguards, on the other hand. Robust impact assessments and a risk-based approach are foundational to a more fit-for-purpose regulatory framework for tech. Together, policymakers and industry need to continue to demystify tech and through transparency, build trust in new products, solutions, and services making citizens lives more convenient.

Our four recommendations:

1 Support local commerce to help SMEs digitalise and grow their businesses

2 Make flexible work better and ensure Europe has the talent it needs

3 Adopt a new mindset for digital regulation to support more European success stories

4 Prioritise quality over quantity in sustainability to achieve net-zero emissions by 2050



1. The EU should embrace local commerce to help SMEs digitalise and grow their businesses

Small and medium-sized enterprises are a key pillar of the European economy, and their adoption and integration of digital technologies across the economy is vital for the overall competitiveness and productivity of the EU. SMEs should be supported in their efforts, and we are committed to being their go-to partner - 86% of all businesses on Wolt are SMEs.

When we asked¹ our merchant partners what they thought about our impact on their business

- 34% of merchants said that they would not have an online business without delivery platform services such as Wolt.
- 33% would not have a delivery option at all and thus be unable to meet consumers' growing desire and expectation to get their products delivered without Wolt and other platforms.
- An estimated 13% businesses would need to reduce staff or close their business without incremental sales through Wolt and other local commerce platforms.

"I was against delivery companies in the beginning. But then I ran the numbers and realised that it made no sense financially to do it myself. Plus, I cannot run a second company next to my restaurant, i.e., a logistics fleet."

Henrik,
Wolt's merchant partner

Key challenge: E-commerce regulation has been driven by regulating risks, not enabling new opportunities. European SMEs are struggling to keep up with the digital transformation, falling short of the targets set in the EU's Digital Decade policy, but also lagging behind in global competition. Local commerce platforms can step in and fill the gaps in skills and provide tools to help SMEs adopt technologies. Unlocking our partner's full potential requires policies that further support merchants' ability to engage in local online sales. Current regulations treat all e-commerce actors with the same risk profile, overlooking the lower risk associated with local commerce platforms compared to cross-border e-commerce companies.

Wolt's contribution

- We ensure that all our SME partners can keep up with the digital transformation without the need for high upfront investment.
- We provide digital tools, such as payments, data analytics, and customer support, and develop them in dialogue with our merchant partners so that our offer always meets their needs.
- We help brick-and-mortar stores compete with digital giants and keep cities vibrant by ensuring that thriving businesses aren't confined to just the most popular streets in town but can flourish in diverse locations thanks to quick deliveries.

Our recommendations for EU 2030

- Adopt a Local Commerce Strategy to ensure EU rules make it as easy as possible for food & retail brick-and-mortar businesses to benefit from digitalisation.
- Unlock all categories of retail also for online sales and local delivery with appropriate safeguards to be implemented with the help of EU Digital Identity Wallet.
- Make the EU target of a 25% reduction in the reporting burden on businesses finally a reality by working more closely together with businesses and stakeholders, and report on the progress made.

¹Local commerce survey 2023: We commissioned Norstat, an independent market research company, to survey our customers and merchant partners. We got answers from 603 independent merchant partners across 16 EU Member States.

2. Make flexible work better and ensure Europe has the talent it needs

More and more workers in Europe see flexible work – including being a Wolt courier partner – as a good option for them. Often, this is the case especially for those that might lack language skills, a relevant degree, or other qualifications. Given the work is flexible, pursuing other goals, such as up- or reskilling or integrating to a new country, becomes much easier. Simultaneously, as European businesses from all sectors strive to compete in the global arena, having access to the talent they need is becoming increasingly important.

When we asked² our courier partners how they see their work:

- 85% of couriers rated the freedom to choose their own working hours as highly important.
- 71% of surveyed couriers in the EU said that they prefer to work as a Wolt courier partner over other work opportunities.
- Over 50% of former courier partners interviewed in another survey felt that partnering with Wolt provided them with cultural and social capital - networks, language skills, understanding of the local culture and provided them with a better position in the labour market.

“The first thing I had to get used to was the cold, but I settled in quickly. The bigger difficulty was the language. Wolt has been a lifesaver for me because I could earn money without speaking Hungarian while also getting a chance to practise it on the job.”

Mohammed,
Wolt courier partner

Key challenge: Europe’s labour market is not meeting people’s needs in terms of being able to work how and where they want. Only some Member States have managed to combine the flexibility courier partners and other freelancers want with the protections they need. For global talent, the EU system is falling behind our competitors, stunting growth and innovation.



Wolt’s contribution

- We always bring the view of our courier partners into the dialogue with policymakers to ensure policies that impact freelancers reflect their priorities.
- We are constantly improving the experience of courier partners, be it in terms of the app or additional benefits like insurance coverage that is offered automatically and free of charge to our partners.
- We have a strong presence in each of our markets and we continue to invest in developing our tech in Europe.

Our recommendations for EU 2030

- Embrace the opportunity of flexible work for the labour market and make the most out of the changing world of work by removing obstacles to working in the way people want to.
- Strengthen the social security nets of the self-employed in line with Principle 12 of the European Pillar of Social Rights.
- Introduce an EU-level points-based immigration system and remove barriers that hinder mobility within the single market.

²Wolt Courier Partner Survey 2023. Quantitative survey conducted by Taloustutkimus during 1 February - 6 March 2023. Roughly 7,000 courier partners participating across 15 EU Member States.

3. Adopt a new mindset for digital regulation to support more European success stories

Our platform makes it easy for customers to order whatever they need, for merchants to make additional sales, and for couriers to make meaningful earnings flexibly. To make all this possible, we maintain and develop a wide range of technologies, from local logistics to retail software and financial solutions.

Our actions include:

- The Wolt Algorithmic Transparency Report is listed as one of the 25 best practices in the global platform economy³.
- Wolt is ISO 27001 certified, the world's best-known standard for information security management systems.

"We commit to ensuring transparency about the use of algorithms and artificial intelligence and that people are empowered and informed when interacting with them."

Wolt Transparency Report

Key challenge: EU legislative frameworks have failed to maintain coherence and consistency as legislative processes have accelerated and new regulation has been created on the basis of perceived threats, not concrete problems. Once a gap in EU law has been identified, it is crucial to take the time to conduct a thorough assessment and evaluation and adopt a tailored strategy to address the problem while ensuring compatibility with existing or pending laws.

Wolt's contribution

- We are leading the work on algorithmic transparency and continue to publish the Wolt Algorithmic Transparency Report⁴ on an annual basis.
- We invest in more robust security measures to ensure users and business partners privacy and security.
- We build bridges between product developers and policymakers in order to demystify tech and to ensure policymakers have the knowledge they need to focus regulation to where it is needed.



Our recommendations for EU 2030

- Boost European tech with a strategy that empowers European digital companies to grow and use new innovation tools to deliver the best services and products, including personalised experiences to their users.
- EU tech should by default have a seat at the table when proposed rules, often designed for a few global players, disproportionately affect their ability to provide the best services, products, and experience to users.
- EU rules should address problems with specific business models instead of a one-size-fits-all approach and any proposed solution should also be proportionate to the problem identified.

³The WageIndicator Foundation is a global, independent, not-for-profit organisation that helps multinational companies implement living wages in their operations and supply chains. In 2023, they recognised Wolt Algorithmic Transparency report on a list of 25 best practices in the global platform economy.

⁴Wolt Algorithmic Transparency report can be found at <https://explore.wolt.com/en/fin/transparency>

4. Prioritise quality over quantity in sustainability to achieve net-zero emissions by 2050

Ursula von der Leyen's Commission's Green Deal legislative package has paved the way for a more sustainable Europe, and we are committed to playing our part and helping our partners too. Every day, hundreds of thousands of orders are placed, sold and delivered through our platform, resulting in impacts on the environment and climate. While we have always been conscious of our impact we are determined to go further and faster by preventing emissions in the first place and removing barriers to low-carbon supply chains.

We are on the right track, and there is a will² to do more:

- 82% of merchants believe that sustainability is very important or important.
- 50% of merchants believe that minimising waste is the most important sustainability issue.

"Our courier partners would like to do more for the climate but face barriers such as the higher upfront cost of electric vehicles, limited charging infrastructure in cities and limited battery range."

Jamie Saab,
Head of Sustainability at Wolt

Key challenge: Large amounts of climate legislation will not automatically lead to better outcomes. A wide range of measures will be needed to achieve the EU's ambitious climate goals, but all decisions should be based on comprehensive, science-based impact analysis and target the right actors in the supply chain. As an online platform, we cannot dictate decisions to our partners, but we are committed to supporting them and leading by example.



Wolt's contribution

- Developing a roadmap to achieve net-zero emissions by 2040.
- Helping our courier partners transition to more sustainable vehicles and drive the adoption of electric vehicles, working towards our goal of halving our carbon footprint per delivery.
- We're working hard to scale and expand reusable packaging programmes to all of our countries and supporting our merchants in choosing more sustainable single-use products. Our goal is to ensure that 100% of our markets can offer sustainable packaging options.

Our recommendations for EU 2030

- Focus actions and requirements where the biggest positive change can be achieved, and which actors can actually influence decisions and obtain information.
- Make purchasing electric vehicles more affordable for the self-employed and businesses through financial incentives such as tax breaks, rebates or grants in order to get more bang for euros spent
- Promote sustainable and safe urban logistics, such as protected cycle lanes and effective micro-mobility solutions, in urban planning programmes, for example, by ensuring the necessary number of charging points and sufficient parking spaces.

²Local commerce survey 2023: We commissioned Norstat, an independent market research company, to survey our customers and merchant partners. We got answers from 603 independent merchant partners across 16 EU Member States.

About Wolt

Wolt is a Helsinki-based technology company that provides an online platform to connect people looking to order food and other goods with people interested in selling and delivering them. To enable this, Wolt develops a wide range of technologies from local logistics to retail software and financial solutions, as well as operates its own grocery stores under the brand Wolt Market. Wolt was founded in 2014 and joined forces with DoorDash in 2022. By March 2024, DoorDash operates in 30 countries, 26 of which are with the Wolt product and brand. Our latest market is Luxembourg, which we launched in February 2024.

By operating a technology platform, Wolt brings convenience to customers as well as creates economic opportunities for its local partners. Simply put, when customers place an order, they make a purchase from Wolt's many local merchant partners, to either pick it up or have it delivered. If the customers want to have the order delivered, Wolt's platform offers the delivery task to courier partners who are online on the platform and willing to accept tasks.

Wolt's contribution:

- Total sales generated over 450 million EUR in taxes
- Over 3 billion EUR in total sales for more than 120.000 merchants in over 500 cities
- Income to over 180.000 courier partners, with a total earning of 750 million EUR





Wolt