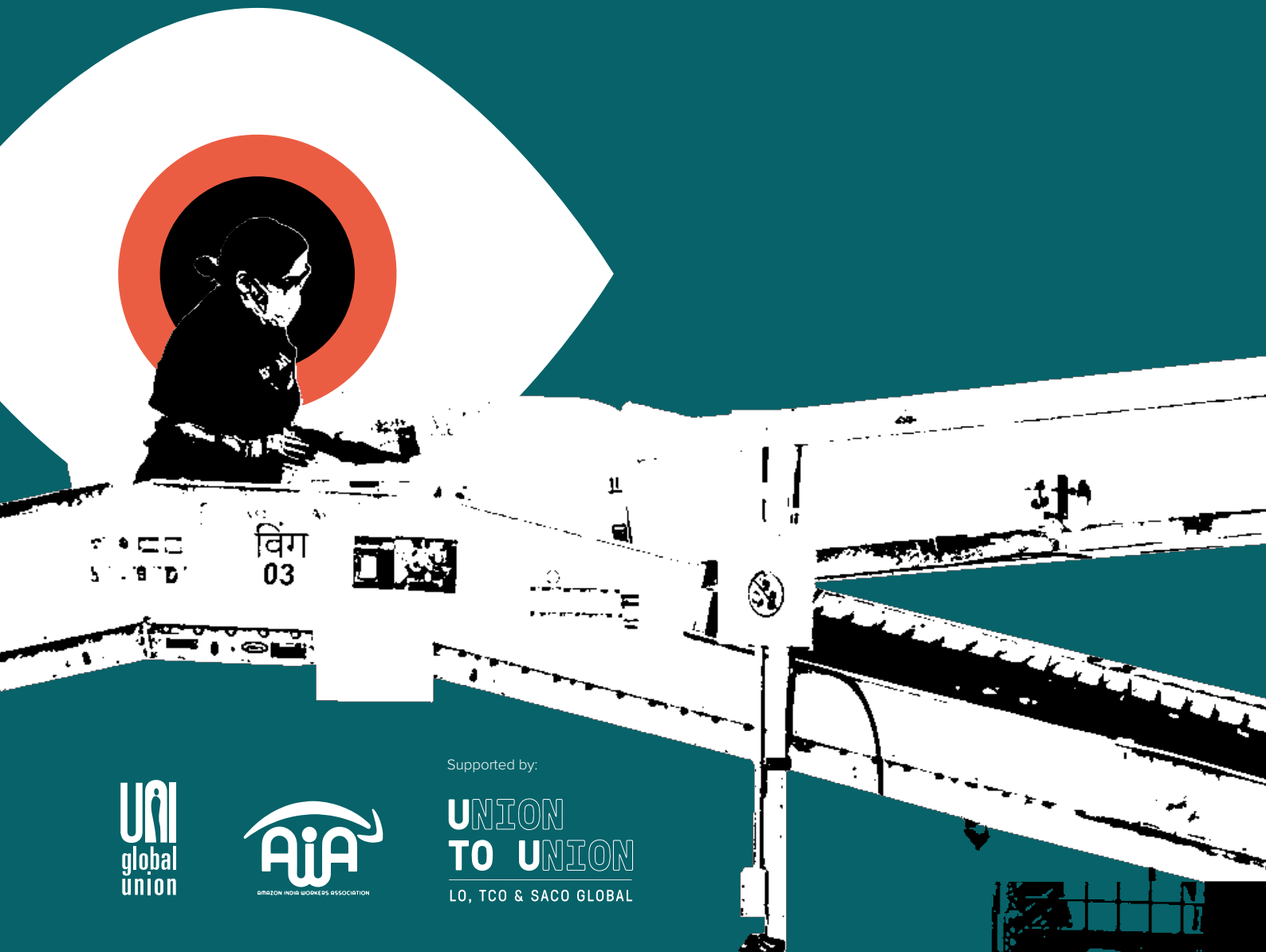


EXPORTING THE AMAZON PANOPTICON: A SURVEY OF AMAZON WORKERS IN INDIA

JUNE 2024



UAW
global
union

AIA
AMAZON INDIA WORKERS ASSOCIATION

Supported by:

UNION
TO UNION
LO, TCO & SACO GLOBAL

CONTENTS

| | |
|-----------------------------------|-----------|
| INTRODUCTION | 3 |
| Background: Amazon in India | 5 |
| Methodology summary | 6 |
| RESULTS | 7 |
| Unforgiving pressure | 8 |
| Demanding safety | 10 |
| Underpaid and undervalued | 12 |
| CONCLUSION: | 14 |
| Seeking Respect | 14 |

INTRODUCTION

In 2022, UNI Global Union conducted the largest ever global survey of Amazon workers, collecting over 2000 responses from 8 countries¹. The results revealed, on an unprecedented scale, the global consistency of Amazon's harmful workplace practices around the world, with a focus on intense work pressure and invasive worker surveillance.

Absent from that survey was data from the world's most populous country – and a major, growing base of Amazon's global operations: India. This year, in order to fill that gap, UNI partnered with the Amazon India Workers Association (AIWA)² and the research agency Jarrow Insights to conduct a new survey of Amazon warehouse workers and drivers in India, with a focus on working conditions, safety, and pay.

Over the 2 months that the survey remained open, **1838 responses were collected from drivers and warehouse workers all over India – making this the largest survey of Amazon workers in India conducted so far**. Unfortunately, the results of the survey are largely in line with the stories and testimony of workers from other countries around the world, indicating a global strategy on the part of the company, and a shared, global set of problems that Amazon workers face.

4 out of 5 warehouse workers said that the targets Amazon sets for their work are difficult or very difficult to achieve.

21.3% of warehouse workers and drivers said the work environment at Amazon is safe.

86.3% of warehouse workers, and **28.0%** of drivers, said they are not given sufficient time to use the restroom.

1 in 5 delivery drivers surveyed said they have been injured on the job.

While navigating an unforgiving work environment, and rushing to meet difficult targets, Amazon workers in India say they also struggle to make ends meet with the pay the company offers. **Strikingly, 43.4% of workers surveyed said that their salary is not enough to satisfy their basic needs**. A similar number said they were paid just enough to get by. Many drivers in particular say they have seen their pay fall in the face of inflation.

In their free response testimony, some workers shared a sense that, given the value they produce for the company, their experiences and concerns deserve far more respect than they receive. This report concludes by linking the findings of the survey to existing on-the-ground organizing by Amazon workers in India, and to concrete demands to improve their working conditions and their lives.

1 UNI Global Union. (2022). Life in the Amazon Panopticon: An international survey of Amazon workers. <https://uniglobalunion.org/report/amazon-panopticon-survey/>. (Last accessed 05/25/24).

2 Taj Ali. (2023). "The Global Fight to Organise Amazon." Tribune. <https://tribunemag.co.uk/2023/10/the-global-fight-to-organise-amazon-bezos>. (Last accessed 05/25/24).

AMAZON'S PRESENCE IN INDIA

AMAZON INDIA
WEBSITE LAUNCH
2013

\$6.5 BILLION
INVESTED BY 2023

13 MILLION
SQUARE FEET OF
WAREHOUSE SPACE

COMMITTED
\$15 BILLION
MORE TO INDIAN
OPERATIONS BY 2030



Background: Amazon in India

Amazon, the world's second largest private employer, is a truly global operation. As growth in the US e-commerce market slows in the wake of the boom of the Covid pandemic, it is increasingly important for the company to search for growth avenues in markets where its presence is less developed.

In the mid-2000s, an explicit choice was made by Amazon to turn away from expansion in China, due mostly to competitive pressures from local e-commerce companies there, and towards India³. India already has one of the largest e-commerce sectors in the world, valued at around \$63 billion, and number that is projected to more than double by 2026⁴.

Since 2013, Amazon has spent more than \$6.5 billion dollars developing its operations in India⁵, and has recently committed to investing \$15 billion more in the country by 2030⁶. Logistics and supply chain consulting firm MWPVL estimates that Amazon operates at least 76 Fulfillment Centers, 17 Sortation Centers, and around 30 smaller Delivery Stations in India, for a total of around 13 million square feet of active warehouse space⁷.

In the Indian e-commerce sector, Amazon faces competition from Wal-Mart owned FlipKart, as well as Indian companies such as Meesho and Reliance⁸. In its 10 years operating in the country, Amazon has developed a market niche particularly in large urban areas and among higher income groups, who prefer Amazon for its trademark fast delivery for Prime members.

The social and physical cost of 1-day shipping convenience, paid by Amazon's own workers, is well known. To fuel its operations in India, Amazon relies on the labour power of thousands of Indian workers to intake, sort, pick, pack, and deliver its packages all around the country.

In India, as elsewhere around the world, workers have not passively accepted the conditions that Amazon puts them in. Instead, they have reacted by making collective demands to the company through strikes, protests, and other means, and by exercising their right to organize in unions. This important context should be kept in mind throughout the report, and will be returned to later.

3 Jason Del Rey. (2019). "Amazon's invincibility is showing some cracks — and a big one is in India." Recode. <https://web.archive.org/web/20190428193817/https://recode.net/2019/2/1/18205635/amazon-india-regulations-q4-earnings-prime-online-retail>. (Last accessed 25/05/24).

4 <https://www.trade.gov/e-commerce-sales-size-forecast>, <https://www.trade.gov/country-commercial-guides/india-online-marketplace-and-e-commerce>

5 "Amazon India report card 'decidedly mixed' despite \$6.5 billion investment." The Economic Times. <https://economictimes.indiatimes.com/tech/technology/amazon-india-report-card-decidedly-mixed-despite-6-5-billion-investment/articleshow/93925105.cms?from=mdr>. (Last accessed 25/05/24).

6 Amazon staff. (2023). "Amazon to take its India investment to \$26 billion by 2030". <https://www.aboutamazon.in/amazon-andy-jassy-narendra-modi-meeting#:~:text=Amazon%20has%20committed%20to%20investing,Indian%20Prime%20Minister%20Narendra%20Modi>. (Last accessed 25/05/24).

7 https://mwpvl.com/html/amazon_com.html

8 Niharika Sharma. (2022). "What is wrong with Amazon in India?". QZ. <https://qz.com/amazon-may-be-taking-a-relook-at-its-india-business-1849834468>. (Last accessed 25/05/24)

Methodology summary

The survey that produced the results presented in this report was hosted online, and was open for a period of 50 days, from February 2nd to March 22nd 2024. The survey was designed collaboratively by UNI, AIWA, and Jarrow Insights, taking into account the known experiences of Amazon workers in India and around the world. It was available in both English and Hindi, but nearly 97% of the results of the survey were provided in Hindi.

Jarrow Insights managed the survey during the data collection period, and carried out the data analysis. Amazon workers in India tend to be from vulnerable socio-economic backgrounds. This, combined with the absence of a consistent sampling frame, makes the use of traditional, probabilistic sampling methods challenging. As such, responses to the survey were gathered using a mixed-method, non-probability approach combining on-site and off-site in-person sampling, as well as digital distribution through social media ads to self-identified Amazon workers on Facebook and Instagram, resulting in a diverse sample. The sample size gathered - 1838 responses - is quite large, accounting for an estimated 2% to 5% of Amazon's total delivery and warehouse workforce in India.

The figures below present an overview of the sample, broken down by worker cohort and employment status at the time of survey response.

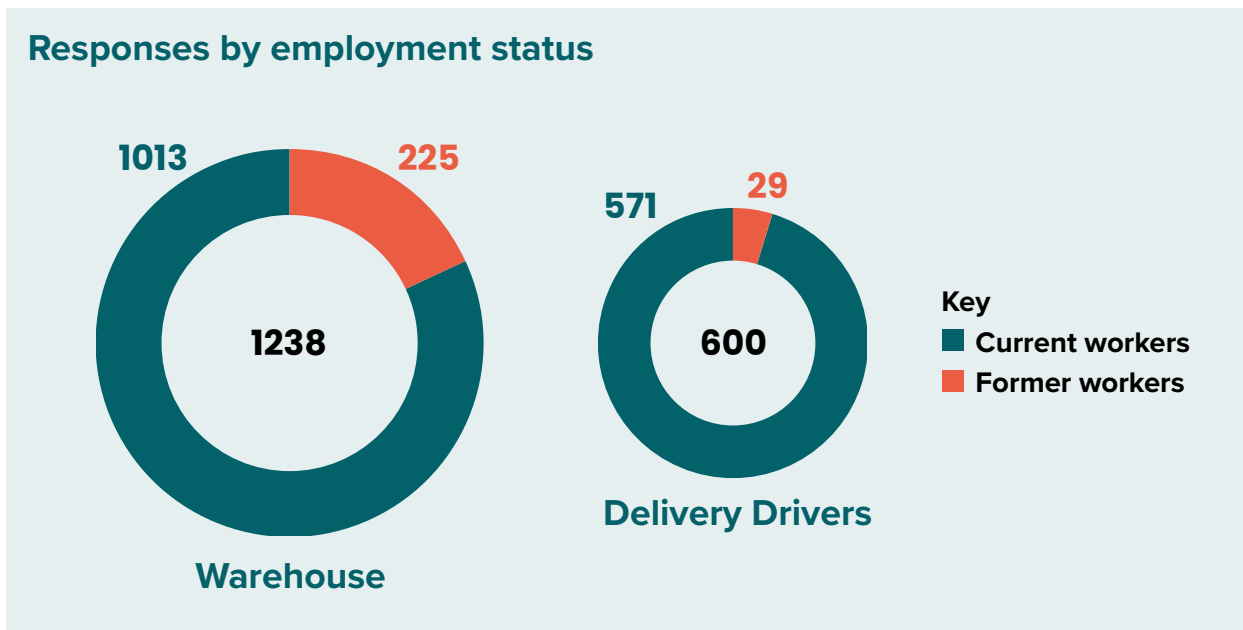
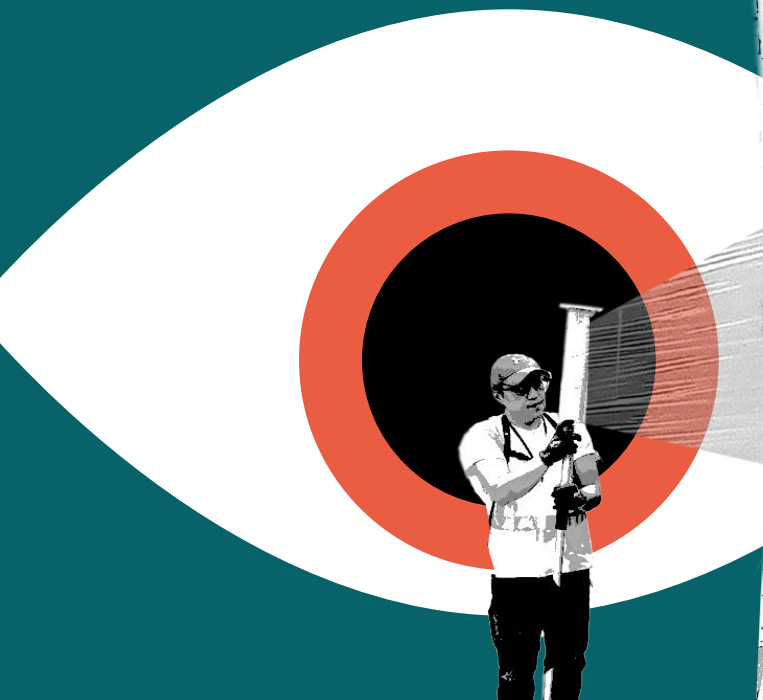


Figure 1. Response counts by job and current employment status at Amazon. The survey was open to current Amazon workers, as well as workers who have worked for Amazon within the past 2 years.

RESULTS

**“WE AREN'T
EVEN ABLE
TO TALK TO
ANYONE
AT WORK”**

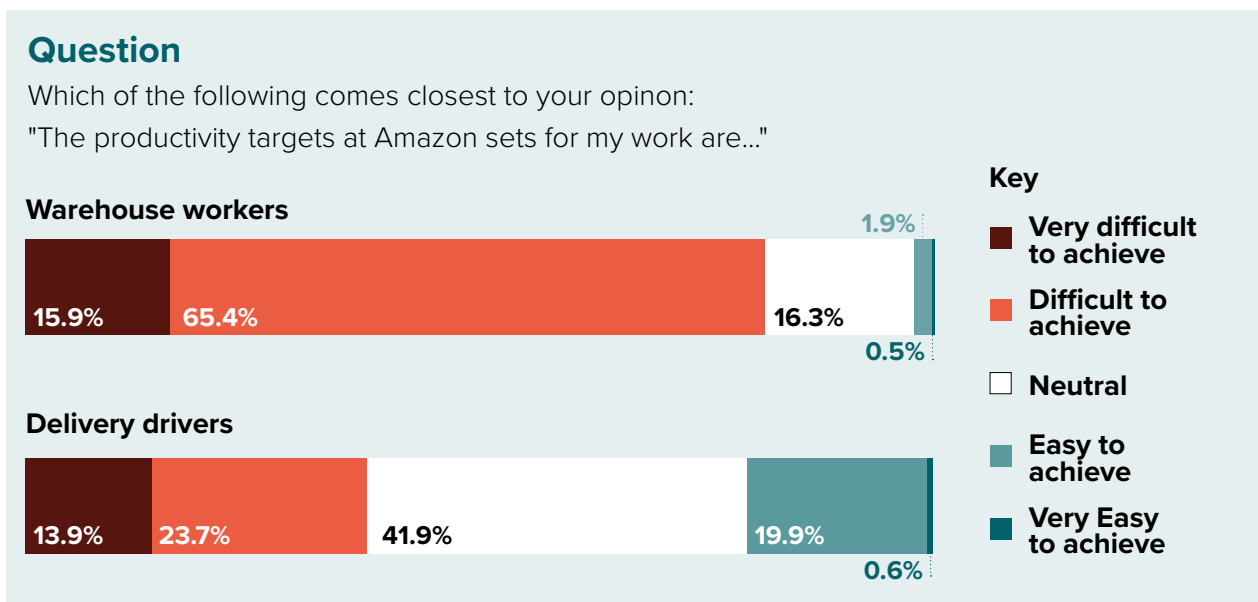


Unforgiving pressure

In country after country, Amazon’s trademark fast delivery has been related to a policy of applying intense pressure to achieve high productivity targets - to “make rate”⁹. Based on the results of the present survey, the situation in India is no different, particularly among warehouse workers. **81% of warehouse workers surveyed said the targets Amazon sets for their work are either difficult or very difficult to achieve.**

| “The workload is too much.” – Warehouse worker

| “Targets should be such that the employees can complete them without facing problems.” – Warehouse worker



Note that while delivery drivers are more ambivalent about the difficulty of targets, just one fifth say that the targets set for their work are easy to achieve.

When productivity expectations are detached from the realities of warehouse worker’s physical limits, the working day is reduced to a constant rush to meet an unreachable goal, with no time left for those things that make the workday sustainable and human, such as rest, socializing, and even eating.

| **“We aren’t even able to talk to anyone at work** due to work pressure.” – Warehouse worker

| “My feet hurt a lot after working standing for 10 hours.” – Former Warehouse worker

9 UNI Global Union. (2022). Life in the Amazon Panopticon: An international survey of Amazon workers. <https://uniglobalunion.org/report/amazon-panopticon-survey/>. (Last accessed 05/25/24), Strategic Organizing Center. (2021). Primed For Pain: Amazon’s Epidemic of Workplace Injuries. <https://thesoc.org/amazon-primed-for-pain/>. (Last accessed 05/25/24).

“The target should be lower and there should be proper breaks for eating.” – Warehouse worker

Around the world, Amazon workers have reported not having sufficient time to use the restroom, and, even more alarmingly, an invasive level of monitoring when they do. The results of the survey show that the situation in India is no different. **Among warehouse workers, nearly 87% said that they are not given enough time to use the toilet at work. 28% of drivers said the same¹⁰.**

“Feedback for being late is given when you take more than 10 minutes in the washroom” – Warehouse worker

Simply setting difficult targets is not enough. In India as elsewhere, Amazon’s productivity targets are enforced by a combination of traditional human managers and automated systems. In their free response answers, Indian warehouse workers shared a feeling of an unforgiving and opaque system of productivity discipline.

“In Amazon, they blacklist people on small issues, issue warning letters, and terminate them from the company.” – Warehouse worker

“We are placed in the identity blacklist if we don’t meet our targets.” – Warehouse worker

“Workers are fired from the company for no reason.”- Warehouse worker

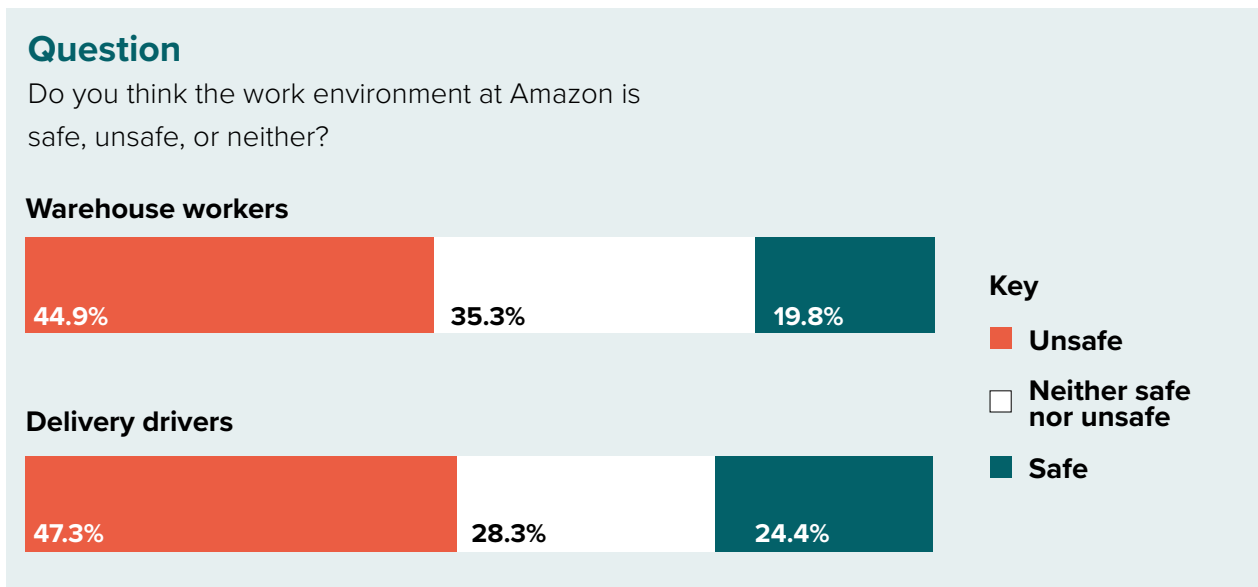
“They don’t tell us anything like this at the time of joining, but when they block our ID without giving any reason, we become completely unemployed.” – Former warehouse worker

“I was a dock clerk and someone scanned the wrong item from my ID, so I was blacklisted even though it was not my fault.” – Former warehouse worker

¹⁰ It is worth noting that a large percentage of drivers (36%) said they would prefer not to answer the question about toilet breaks. As such, the final number could be much higher.

Demanding safety

The intense work pressure described in the previous section is not just physically draining and stressful, but dangerous. **Less than a quarter of both warehouse workers and drivers (19.8% and 24.4% respectively) said that the working environment at Amazon is safe.**



Alarmingly, 21.5% of delivery drivers surveyed said that they have been injured on the job. This strikingly high number is quite similar to a 2021 study on injury rates among Amazon drivers in the United States¹¹. In the free response answers of drivers, familiar themes arise that have appeared in the testimony of those who deliver Amazon's packages around the world – the physical stress of heavy packages, the fear of unfriendly dogs¹², and most of all, pressure that forces them to take risks, whether behind the wheel or approaching the doorstep¹³.

"While driving, we drive very carefully, but sometimes due to the delivery targets we have to drive fast. Then, **whom should we ask to look out for our safety? There is no hearing of our grievances.**" – Delivery driver

"The company says the weight of an order is up to 40 kg, but we are given up to 70 kg. While carrying it, we have to take care of our own safety and that of others, which sometimes leads to situations that can become very difficult." – Delivery driver

11 Strategic Organizing Center. (2022). The Worst Mile: Production Pressure and the Injury Crisis in Amazon's Delivery System. <https://thesoc.org/wp-content/uploads/2022/05/The-Worst-Mile.pdf>. (Last accessed 05/25/24).

12 Jules Roscoe. (2023). "We Can't Defend Ourselves": Amazon Isn't Doing Enough About Its Dog Bite Problem, Drivers Say." Vice. <https://www.vice.com/en/article/ak3n78/we-cant-defend-ourselves-amazon-isnt-doing-enough-about-its-dog-bite-problem-drivers-say>. (Last accessed 25/05/24).

13 Aleeya Mayo. (2021). "Amazon delivery drivers say there's a 'giant war' between them and the company as they struggle to meet package quotas". Business Insider. <https://www.businessinsider.com/amazon-drivers-interview-giant-war-between-them-and-company-packages-2021-7>. (Last accessed 25/05/24).

“The pay is very low and **there is a danger of dog bites during work.**” – Delivery driver

The safety concerns shared by warehouse workers are distinct, and often related to the sheer length and intensity of the working day, which pushes their bodies to their physical limits.

“**We’re made to work for 10 hours and not even allowed to sit.**” – Warehouse worker

“Sometimes we have to work even when we have a fever. **We have to stay standing for 10 hours** to reach the target.” – Warehouse worker

“Sometimes I feel ill while working.” – Warehouse worker

“The pressure of work becomes very high, which leads to the workers getting injured or even passing out.” – Warehouse worker

Around the world, Amazon has faced scrutiny for high injury rates in its warehouses. As recently as this year, independent research suggested that the injury rate at the company’s US warehouses was as much as 70% higher than that of comparable companies¹⁴. **Among Indian warehouse workers surveyed here, 4.8% said they had been injured on the job** – within the range of recent estimates from Amazon’s warehouse operations the United States. It is also worth noting that this question, compared to others, received a relatively higher level of non-response from workers, who may see it as a sensitive subject.

The fundamental principal of occupational safety and health is for the employer to provide a safe workplace and minimize risks¹⁵. A further question regards how the employer deals with accidents and injuries when they do occur. In this respect, in their free response data, some workers expressed that even when they are injured, they don’t receive the assistance or compensation they deserve.

“**I had an accident and no one helped me.** I spent all my money.” – Delivery driver

“Due to high work pressure, health issues arise, and **we are not even allowed to take leave.**” – Warehouse worker

Among drivers in particular, a common complaint was their lack of coverage under the Employee State Insurance Corporation (ESIC) and Employees Provident Fund Organisation (EPFO), the state agencies responsible for social security and retirement benefits – yet another consequence of the

14 Tung et. Al. (2024). Amazon’s Outsized Role: The Injury Crisis in U.S. Warehouses and a Policy Roadmap to Protect Workers. National Employment Law Project. <https://www.nelp.org/insights-research/amazons-outsized-role-the-injury-crisis-in-u-s-warehouses-and-a-policy-roadmap-to-protect-workers/>. (Last accessed 25/05/24).

15 See International Labour Organization convention on OSH: <https://normlex.ilo.org/dyn/normlex/en/f?p=NORMLEXPUB:12100:0::NO::> (Last accessed 25/05/24).

precarious state that these drivers live and work in. Whether they are classed as “independent” gig¹⁶ workers through Amazon’s Flex program, or as employees of “third party” Delivery Service Providers, Amazon – the company whose profits they support - does not take responsibility for their well-being

“Amazon drivers should be given two mandatory facilities by the government: (1) ESI and (2) EPF.” – Delivery driver

“There should be ESIC, EPF, insurance. **I had an accident, so I stayed at home for a month and did not get any money.**” – Delivery driver

“We want social security for ourselves.” – Delivery driver

Underpaid and undervalued

“If someone asked me how much rating I would give to Amazon, I would give only 2 stars out of 5.” – Warehouse worker

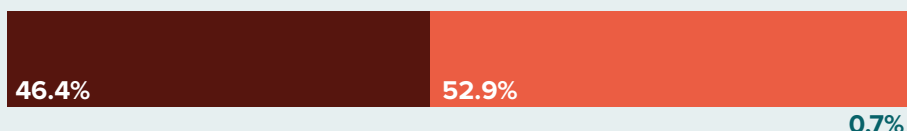
“No one respects us. **We should get respect** along with work, and our income should also be increased keeping inflation in mind.” – Delivery driver

Resoundingly, the Amazon workers surveyed indicated that their pay is insufficient to meet their cost of living. **55.3% of workers said their salary is just enough to meet their basic needs, and nothing more. 43.4% said it was not enough to meet their basic needs.** Overall, just 25 workers said their salary was more than enough to meet their basic needs.

Question

Consider your basic needs, considering things such as food, housing, education, and healthcare, as well as the needs of the people who rely on you. Which of the following comes closest to your opinion?

Warehouse workers



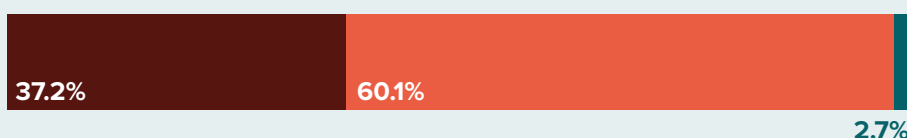
Key

Not enough to meet my basic needs

Just enough to meet my basic needs, and nothing more

More than enough to meet my basic needs

Delivery drivers



16 Vasudevan et. Al. (2024). The RIGHTS Survey: Report on a Nationwide Survey of Platform Workers in India. https://www.naagrikfoundation.in/_files/ugd/a7c716_7d992effe3514a9dba60b83a5dea5aca.pdf. (Last accessed 25/05/24).

- | “There is **more work and less money.**” – Warehouse worker
- | “The salary is very low compared to the work.” – Warehouse worker
- | “I have been a part of Amazon for 8 years. **There has been no pay raise in 4 years.** Now the new joining associates and the old associates are on the same salary.” – Warehouse worker

While the proportion of warehouse workers who said their salary is not enough to meet their basic needs was somewhat higher than that of delivery drivers, **many drivers noted with frustration that their pay rate per package has actually gone down over time.** As in other countries, Amazon does not actually employ its last-mile delivery workforce directly, but uses a mix of third-party Delivery Service Providers and “gig work” employment. In particular for these precarious workers, unilateral cuts in their pay can reinforce a sense of lack of control over their own working conditions.

- | “Inflation is increasing and our packet prices are decreasing” – Delivery driver
- | “Both pay rate and number of packets have been reduced due to which earnings have gone down. **I have made up my mind to leave the job.**” – Delivery driver
- | “Earlier the pay rate was Rs 17, now it is Rs 14.” - Delivery driver
- | “Earlier the pay rate used to be Rs 18, but gradually it has reduced to Rs 10. The rate should increase and ESI should be provided.” – Delivery driver
- | “When I started work three years ago, I used to get Rs 21 per delivery. Now it has come down to Rs 15 per delivery, while the payments for delivery at other platforms have increased.” – Delivery driver

CONCLUSION:

Seeking Respect

“A gig worker is ready to deliver the goods needed by everyone to every house, 24 hours a day, because whenever he gets work, he does it. But why is the company and the government closing their eyes? ... **We also have families and children. That's why I want to say that we should get our rights.**” – Delivery driver

While many of the statistics presented in the previous pages reveal a concerning – if unsurprising – image of the status quo, they by no means indicate that Amazon workers in India are helpless. In fact, the size of the sample gathered is a testament to the strong desire of these workers to have their voices heard, and to make a change in their lives.

In their free response answers, many workers expressed a keen sense of their role and importance to the company, along with their belief that their experiences matter and should be taken into account.

“We are giving good profits to the company. The company should also increase our wages considering our hard work and performance.” – Deliver driver

Many of the findings of the survey reinforce existing and concrete demands made by Amazon workers in India organized in the Amazon India Workers Association (AIWA), as well as in the context of the international Make Amazon Pay campaign¹⁷. In particular, the findings provide quantitative support to the demands that Amazon India:

- Establish equal, and higher, pay for its staff.
- Set realistic and practical targets.
- Stop the unilateral blocking of cards without notice.
- Provide adequate and convenient welfare facilities that provide places to rest and include sanitation and hygiene facilities.
- Ensure appropriate compensation for all employees affected by duty-related accidents.

This report has shared the voices and experiences of Amazon workers in India, which are often in harmony with Amazon workers around the world. The problems facing these workers are clear, and their solution could have effects far beyond Amazon itself. As the Indian e-commerce sector develops at a rapid rate, Amazon workers have a chance to set the standard for all Indian e-commerce workers, whether they spend their shifts out delivering packages, or on the warehouse floor.

¹⁷ AIWA, Gig Workers Association, CLEAN Mobility Collective. Make Amazon Pay Petition. (2023). <https://act.jhatkaa.org/campaigns/make-amazon-pay>. (Last accessed 25/05/24).

UNI Global Union extends its heartfelt gratitude to all contributors who have played a pivotal role in achieving our successes. This includes our dedicated affiliates, who have run organizing campaigns and supported the Organizing Fund, and the invaluable contribution of Union to Union. Their collective commitment makes our success possible.



www.uniglobalunion.org

Representing more than 20 million workers in 150 countries, UNI Global Union is driven by the responsibility to ensure skills and service jobs are decent jobs and that workers' rights are protected, including the right of union representation and collective bargaining.



Amazon India Workers Association (AIWA) is working with Amazon warehouse workers from the perspective of collectivization, labour rights, occupational & health safety, workers education and support services.

UNION TO UNION

LO, TCO & SACO GLOBAL

Union to Union coordinates LO, TCO, Saco and their affiliates in union development cooperation. Through Union to Union, the Swedish unions support around a hundred trade union development projects in as many countries.

That means support for unions all over the world.



Jarrow Insights is a Companies House registered workers' co-operative, a member of the Co-Tech digital co-ops federation and of Co-operatives UK.