Fairwork

FAIRWORK ANNUAL REPORT 2023

State of the Global Platform Economy

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EDITORIAL

Is the bubble bursting? Crisis and consolidation in the platform economy

2023 has been a year of both consolidation and crisis in the platform economy. Most significantly, pressures in international markets have created challenging conditions for platform companies that all too often are passed down to workers in the form of declining pay, worsening conditions, and management standards at work.

A global inflationary crisis, caused by a range of geopolitical events and the ongoing legacy of the COVID-19 pandemic saw interest rates rise and the cost-of-living spiral. The former resulted in a tech financing crash, with the increased costs of borrowing stopping companies from pursuing risky 'burn rates' (i.e. loss-making enterprise), and instead switching back to more conservative financial decisions better equipped to navigate these tempestuous financial winds.[1]

This has impacted platform workers in three interlocking ways. First, the cost-of-living increase has decimated much of the user demand for platform services, as cutbacks to budgets mean less expendable income for cabs, takeaways, cleaning and beauty services. This is compounded by inflation which increased the cost of doing business for workers (who are paying more for the tools they need for their trade, like cars, fuel, or bike maintenance). Finally, workers are having to compete with more people than ever for a dwindling number of jobs, as many currently earning near-minimum wage have found their earnings do not keep up with inflation and have therefore turned to platform work to supplement their incomes.

In short, the number of platform workers looking for earning opportunities on digital labour platforms is increasing quicker than the number of jobs available. And when workers are lucky enough to get consistent work, the costs associated with doing that work are increasing, meaning effective take-home pay is decreasing over time. Meanwhile, many platform companies are having to contend with decreased demand for their services, as high levels of inflation have reduced consumer demand in the post-pandemic era.

This has been a common story across Fairwork's research network, with workers often left with no choice but to work longer hours and more intensely than ever before. The rise of algorithms to assign and manage work has also exacerbated work intensification, fostering increased competition between workers and the effective devaluation of labour.[2] This downward pressure on working conditions leads to fatigue and accidents as long hours without breaks become commonplace. Meanwhile, in Cloudwork platforms (that is, platforms that support remote freelancing work), workers are finding that they must undertake high amounts of unpaid work and deal with competition for jobs, leading to overwork or to working through the night to make a living.

The Fairwork Cloudwork ratings for 2023[3] showed that web-based platforms are still far from meeting Fairwork Principles. However, some companies acheived higher scores, such as ComeUp, a French platform, and Terawork, a Nigerian platform; or specific sector platforms such as Prolific, which focuses on academic surveys. The report also highlighted the problems faced by workers working on microwork – the undertaking of very small tasks for very small payment (often only a few cents) - for projects related to content moderation, AI, and cutting-edge technology developments. These workers receive, on average, $2 USD an hour and struggle with challenges related to payment, access to jobs and work conditions.[4]

The embodied stresses and strains of sitting or cycling all day mount up, causing a specific set of health issues for platform workers. And all of this has been happening through record heatwaves across the globe that have left workers dealing with high temperatures as they work.

This year we have witnessed the climate emergency emerge as the latest threat to workers' wellbeing, with workers toiling through extreme conditions (including extreme heat, cold, winds, and flooding) to continue their work. In some cases, platforms increase or supplement fees with bonuses that actively incentivise such risk-taking to keep the service online. Others offer no incentives at all, meaning workers need to continue working at high productivity rates despite the extreme conditions. In only very rare cases do we see platforms temporarily pause their service during periods of extreme weather to safeguard their riders, and it is rarer still that workers are remunerated for time spent not working due to adverse weather. Whilst many countries have advisory temperature limits for work, legal limitations on safe climatic working conditions are rare. This is further exacerbated in relation to platform labour as many workers are self-employed, and thus don't enjoy wage protection if time away from work is needed because climatic conditions have become dangerous. We hope to see significant changes in the future, as the climate emergency continues to deepen.

THE DECLINE OF WORKING CONDITIONS ON MULTIPLE FRONTS HAS BEEN MET WITH RESISTANCE EFFORTS FROM WORKERS.

However, the decline of working conditions on multiple fronts has been met with resistance efforts from workers. Strikes and industrial action from platform workers across the globe continued in 2023, as thousands expressed their dissatisfaction with deteriorating conditions. Ride-hailing drivers for Uber, Bolt and inDrive went on strike across the African continent in 2023,[5] as did Uber drivers in the United Kingdom (UK), the United States (US) and Brazil.[6] Similar strikes erupted in the international food delivery sector, with workers in the UK, the US, Serbia,[7] India[8] and others protesting low pay, lack of a social safety net and sudden changes in earnings against myriad companies including Deliveroo, Wolt, Uber Eats, Just Eat/Liferando and others. A massive strike was also held by the workers of the multi-service platform Urban Company, who protested against what they considered to be arbitrary deactivations in India.[9]

These worker actions spread beyond the traditional gig economy. Fairwork research also demonstrates that the deployment of AI in the workplace can lead to work intensification. For instance, Amazon warehouse workers in Coventry have protested against being treated "like robots" as the productivity software that managed them heightened competition between workers and failed to account for their struggles with care responsibilities and ill-health.[10]

Returning to the platform economy, Fairwork has observed platforms' fight to obtain monopoly or duopoly status for work in various sectors and markets continuing. In some regions, like Latin America, this has meant different companies are consolidating in one market and not competing in others.[11] Elsewhere in Europe, this has resulted in major acquisitions of firms, such as Getir's high-profile buyout of Gorillas in a $1.2 billion deal late last year in a bid to become the biggest player in the rapid grocery delivery sector in Europe.[12] In almost all markets, platform companies are struggling to become profitable (often recording significant operating losses since being founded).[13] This year, we have seen a corresponding tightening of pay and conditions as companies either try to become profitable, or try to demonstrate the possibility of profitability in an effort to attract further capital investment in challenging international financial markets. Faced with the need to decrease costs and/or increase incomes, workers have felt the squeeze of these measures most acutely. The promise platforms share with investors, is that by taking a monopoly position in the market they will be able to increase the cost to customers and drive future sustainable profitability. However, the toll this strategy is taking on today's workers is rapidly becoming evident.

Amidst this bleak outlook, some platforms are making efforts to distinguish themselves in these hyper-competitive markets by improving working conditions. Working closely with Fairwork, Glovo's Courier Pledge has been operating for over two years, and commits them to improve their worker's social rights and benefits.[14] In their Environment, Social and corporate Governance (ESG) report, Urban Company believes that to be 'sustainable' it has to reduce barriers to work, particularly for women, put in place a social safety net and provide 'middle-class earnings'.[15] Whilst these are commitments and not necessarily achievements at this stage, in portraying themselves as worker-friendly, such platforms eagerly demonstrate their ethical credentials to consumers in the hopes that it will lead to customer loyalty. Our 2023 survey of 963 Indian consumers backs this up, demonstrating that consumers are also sensitive to reports about worker exploitation and are willing to pay more for platforms that offer better working conditions (see Box 2 for more details).[16] It is thus not surprising to see that platforms have engaged with us on how to improve their working conditions, resulting in 131 pro-worker changes made to platform policies this year. Of course, ESG and other sustainability claims should be treated with extreme caution, and not be allowed to 'fairwash' or hide poor conditions on the ground. Workers, civil society, and financiers must continue to apply pressure to those platforms with sustainable claims, to make sure they follow through on them and actualise these benefits.

Some platforms have managed to find financial success throughout these challenging times. For example, Uber saw their first-ever operating profits in 2023, recording a net income of $221 million in Q3 2023, after 10 years of operation.[17] Similarly, cost-cutting at global food delivery firm Deliveroo has yielded reports of breaking even for the first time in late 2022 (after pulling out of the Netherlands and Australia, citing the 'challenging economic conditions').[18] Other large multinational platforms have also benefited; the ride-hailing platform Didi returned to profitability for the first time since 2021, and Grab, the super-app which offers services including ride-hailing, food delivery, and payments in Southeast Asia, posted its first adjusted core profit this year.[19]

In sum, 2023 is the first year that many platforms have either made a profit or broken even, suggesting the start of a paradigmatic shift in platform operating models from the investor-oriented fundraising strategy to capture market share, to a more traditional profit–loss strategy in the most mature market segments. But profitability for the platform does not always correlate with increased earnings, as margin increases have come at the cost of wage depreciation and declining conditions. As such, workers have felt platforms navigating this shift through deep cuts to their earnings and a steady decline in their working conditions — a worsening environment that has led to strikes across the world. These imposed costs on workers have been exacerbated by a cost-of-living crisis and high levels of inflation, and further compounded through the deployment of AI and algorithms to manage work. These forces have combined with a tech financing crisis – and an unprecedented heat wave in much of the world that has made the job even more precarious and dangerous. Amidst this dire outlook, this year's ratings also demonstrate the increasing pressure on platforms to improve working conditions.

While most platforms continued to score 0 points in 2023, we have been have involved in more positive changes to platform conditions than ever before. This is illustrative of the dilemma many platforms now find themselves with: cut costs (like workers' pay and benefits) to grow profit margin but risk alientating workers or forcing people to toil in unfair and unsafe conditions, or give staff the best platform to work sustainably from in the future by building out more a more ethical system less focused on growth and more focused on consolidation in challenging times. At Fairwork, we will continue our action research to promote pro-worker changes that will make platform work sustainable for all.

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AMIDST THIS BLEAK OUTLOOK, SOME PLATFORMS ARE MAKING EFFORTS TO DISTINGUISH THEMSELVES IN THESE HYPER-COMPETITIVE MARKETS BY IMPROVING WORKING CONDITIONS.

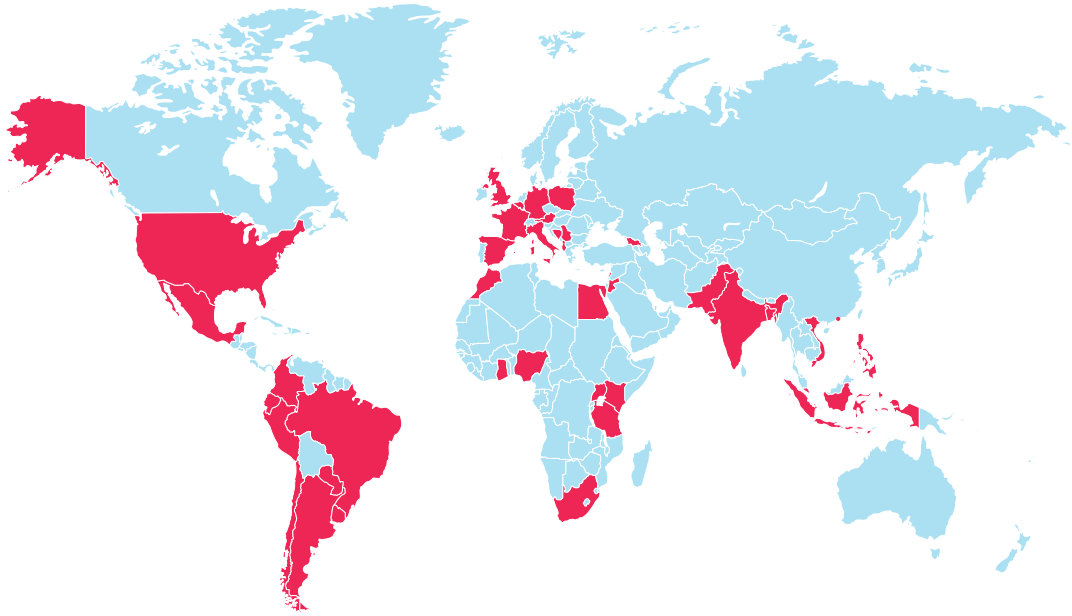
The Fairwork Project

Fairwork evaluates and ranks the working conditions of digital labour platforms. Our ratings are based on five Principles that platforms should ensure in order to be considered to be offering basic minimum standards of fairness.

We evaluate platforms annually against these Principles to show not only what the platform economy is today, but also what it could be. The Fairwork ratings provide an independent perspective on labour conditions of platform work for policymakers, platform companies, workers, and consumers. Our goal is to show that better, and fairer, jobs are possible in the platform economy.

The Fairwork project is coordinated from the Oxford Internet Institute and the WZB Berlin Social Science Center. Our growing network of researchers currently rates platforms in 39 countries across five continents. In every country, Fairwork collaborates closely with workers, platforms, advocates and policymakers to promote a fairer future of platform work.

Figure 1. Fairwork currently rates platforms in 39 countries worldwide



AFRICA

Egypt, Ghana, Kenya, Morocco, Nigeria, South Africa, Tanzania, Uganda

ASIA

Bangladesh, India, Indonesia, Jordan, Lebanon, Pakistan, Philippines, Singapore, Vietnam

EUROPE

Albania, Austria, Belgium, Bosnia and Herzegovina, France, Georgia, Germany, Italy, Poland, Serbia, Spain, UK

SOUTH AMERICA

Argentina, Brazil, Chile, Colombia, Ecuador, Paraguay, Peru, Uruguay

NORTH AMERICA

Mexico, US

The Fairwork Framework

The five Fairwork Principles were developed through multiple multi-stakeholder workshops at the International Labour Organisation.

To ensure that these global Principles were applicable in the local context, we have subsequently revised and fine-tuned them in consultation with platform workers, platforms, trade unions, regulators, academics, and labour lawyers.

Based on these core tenents, we have created context-specific Principles to rate the working conditions in location-based platform work, cloudwork and AI. Details of each set of Principles can be found at **fair.work/Principles**.

The five Principles

Fair Pay

Workers, irrespective of their employment classification, should earn a decent income in their home jurisdiction after taking account of work-related costs. We assess earnings according to the mandated minimum wage in the home jurisdiction, as well as the current living wage.

Fair Conditions

Platforms should have policies in place to protect workers from foundational risks arising from the processes of work, and should take proactive measures to protect and promote the health and safety of workers.

Fair Contracts

Terms and conditions should be accessible, readable and comprehensible. The party contracting with the worker must be subject to local law and must be identified in the contract. Regardless of the workers' employment status, the contract is free of clauses which unreasonably exclude liability on the part of the service user and/or the platform.

Fair Management

There should be a documented process through which workers can be heard, can appeal decisions affecting them, and be informed of the reasons behind those decisions. There must be a clear channel of communication to workers involving the ability to appeal management decisions or deactivation. The use of algorithms is transparent and results in equitable outcomes for workers. There should be an identifiable and documented policy that ensures equity in the way workers are managed on a platform (for example, in the hiring, disciplining, or firing of workers).

Fair Representation

Platforms should provide a documented process through which worker voice can be expressed. Irrespective of their employment classification, workers should have the right to organise in collective bodies, and platforms should be prepared to cooperate and negotiate with them.

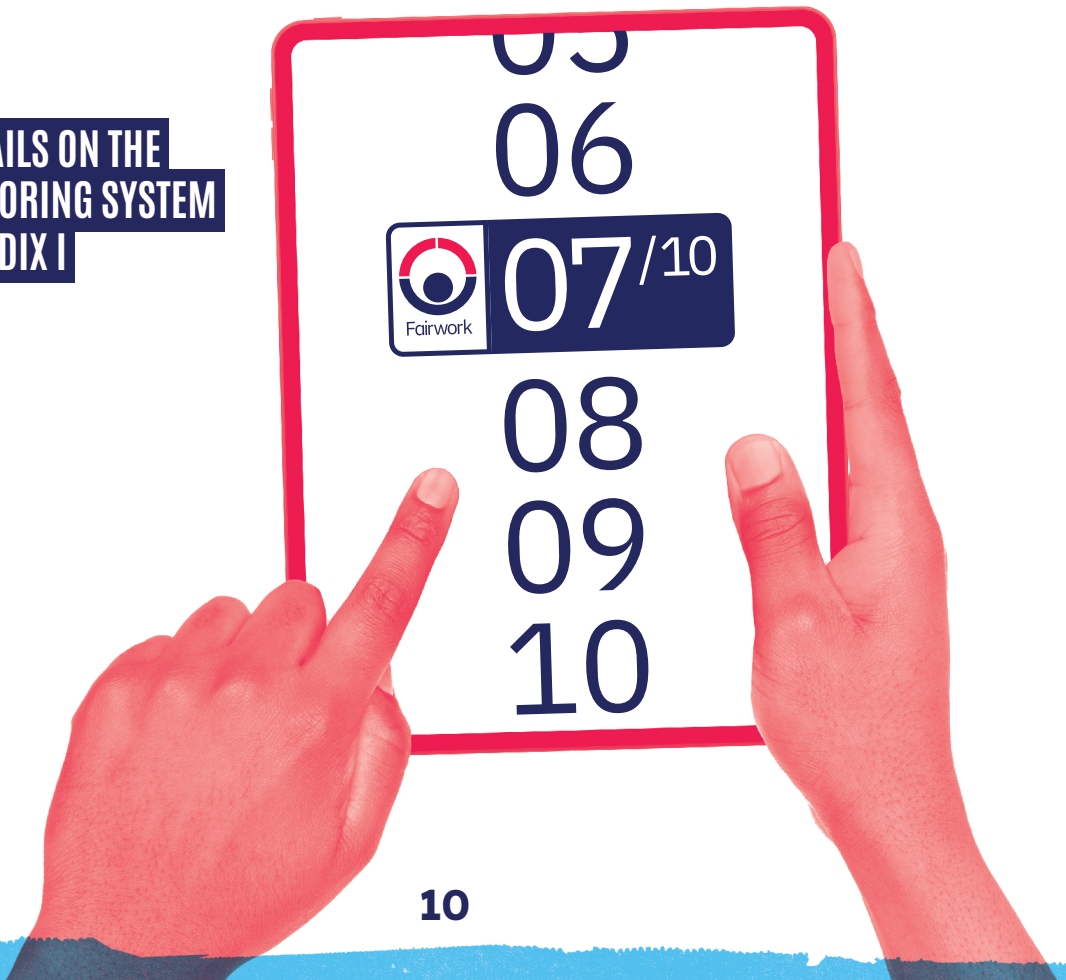
The Fairwork project uses three approaches to effectively measure fairness of working conditions at digital labour platforms: desk research, worker interviews and surveys, and interviews with platform management.[20] Through these three methods, we seek evidence on whether platforms act in accordance with the five Fairwork Principles.

How we score

Each of the five Fairwork Principles is broken down into two points: a first point and a second point that can only be awarded if the first point has been fulfilled. Every platform receives a score out of 10. Platforms are only given a point when they can satisfactorily demonstrate their implementation of the Principles. Failing to achieve a point does not necessarily mean that a platform does not comply with the Principle in question. It simply means that we are not – for whatever reason – able to evidence its compliance.

The scoring involves a series of stages. First, the in-country team collates the evidence and assigns preliminary scores. The collated evidence is then sent to external reviewers for independent scoring. These reviewers are both members of the Fairwork teams in other countries, as well as members of the central Fairwork team. Once the external reviewers have assigned their scoring, all reviewers meet to discuss the scores and decide final scoring. These scores, as well as the justification for them being awarded or not, are then passed to the platforms for review. Platforms are then given the opportunity to submit further evidence to earn points that they were initially not awarded. These scores then form the final annual scoring that is published in the annual country Fairwork reports.

FURTHER DETAILS ON THE FAIRWORK SCORING SYSTEM ARE IN APPENDIX I



Fairwork Ratings 2023

In this section of the report, we will give an overview of the areas of work we have conducted research into this year. This includes the continuation of our location-based and online remote platform work. In response to the growing significance of Artificial Intelligence in the work place and in the global economy, we include details of our first Fairwork AI report. Finally, we give an overview of our Cloudwork research findings, summarise the results of our Translation and Transcription report and share evidence from the first platform to achieve 10/10 in Fairwork's rating.

Pro-worker Changes through Engagement with Fairwork

This year, the 270 platforms Fairwork rated scored an average of 1.2 out of 10 possible points. Given the platform economy's difficult socio-economic conditions and the many strikes by workers protesting worsening conditions this year, such low ratings are unsurprising. This fall in scores might also reflect that many platforms were rated for the first time this year, following the incorporation of 11 new countries in the Fairwork network.

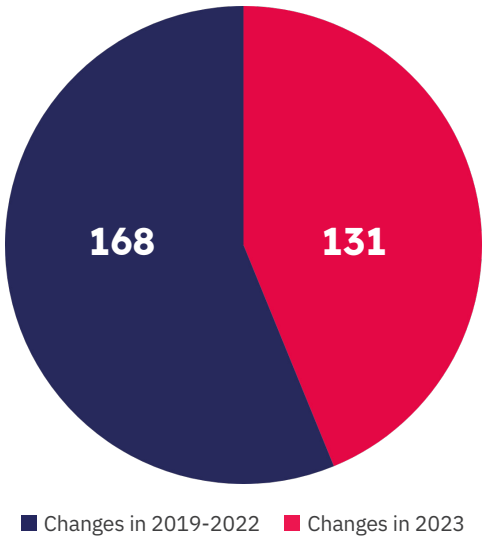
THIS YEAR MORE PLATFORMS THAN EVER BEFORE ENGAGED WITH FAIRWORK DIRECTLY, MAKING CHANGES TO IMPROVE WORKING CONDITIONS.

We have seen in the past that platforms score typically low in the first year of scoring, and it is through Fairwork's sustained presence in a country that scores gradually rise, as platforms engage with us to consider and strengthen their policies, leading to improved conditions for their workers. This year more platforms than ever before engaged with us directly, making changes to improve working conditions. In 2023, there were 131 pro-worker changes made to company practices, compared with 168 changes in all previous years (2019-2022) combined.

As Figure 2 demonstrates, this means that 2023 saw nearly as many pro-worker changes being made as in 2019-2022 combined.

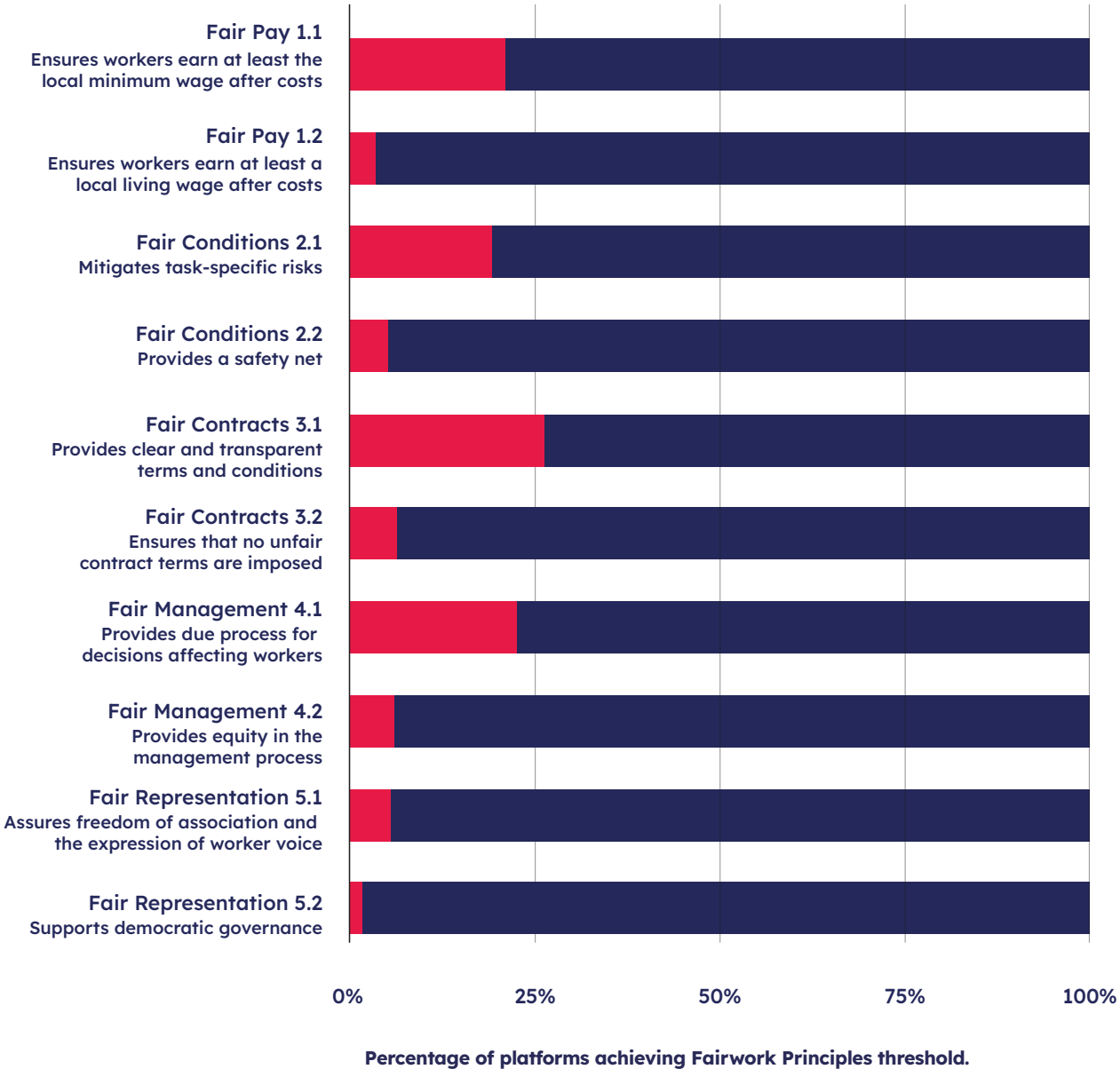
Figure 2. Total number of pro-worker changes in 2023 versus total number of changes in all other years of Fairwork research

Pro-worker changes in company practices



A closer look at the scores this year shows that platforms were particularly likely to score points for Fair Contracts and Fair Management when compared to previous scoring rounds, with most beneficial changes being made to contractual and management conditions following engagement with Fairwork. Platforms' impetus to make these changes can be traced to increased legislation worldwide around data protection and privacy laws and a greater willingness on the part of platforms to improve communications and give workers the ability to appeal decision-making. These are encouraging developments, but it should be noted that scores for Principle 5 (Fair Representation) continue to remain low, with little evidence that most platforms are willing to acknowledge collective worker voices. Individual country ratings can be found in Appendix II. Figure 3 shows the extent to which Principles have been achieved across the 270 platforms scored in 2023.

Figure 3. Total number of points achieved as a percentage of the total number of possible points per Principle in 2023



AI Ratings

Fairwork's collaboration with the Global Partnership on Artificial Intelligence (GPAI) has continued in 2023. This year, Fairwork has launched its first ever AI report, to study working conditions in the AI supply chains, coming at the intersection of cloudwork, geographically tethered work, and the traditional labour market. The ten 'AI for Fair Work' Principles[21] generated in 2022 through a global stakeholder consultation conducted via the GPAI have been updated in 2023 to form the Fairwork AI Principles[22]. Structured around Fairwork's internationally recognised core Principles (fair pay, fair conditions, fair contracts, fair management and fair representation), this new framework provides a concrete guide to fair work in employment settings where AI systems are being deployed in the workplace.[23]

The first Fairwork AI report published in December 2023[24] presents the results of a case study of Sama, a large data annotation company that aims to have a positive social impact. However, labour conditions in the AI supply chain are often poor. Across the world, there is increasing attention paid to the precariousness these workers experience. Sama was awarded a score of 5 out of 10, based on the AI for Fair Work Principles. The key improvements Sama made to the working conditions of its workers through their engagement with Fairwork were the focus of the report.

Through collaboration with Fairwork, Sama has made 24 significant changes in the past year to their operational model and business practices, such as increasing the base salaries of all employees to the recommended living wage or changing the length of basic contracts to improve employment security. Sama have also made significant changes to improve the existing management practices in the company, including a 'zero tolerance culture campaign' to improve the organisational culture. Before these changes came into effect, Fairwork's initial findings revealed a very different picture. The workers highlighted issues of unpaid overtime, short-term contracts, dangerous levels of job strain, excessive surveillance, discriminatory management practices, trade union victimisation and a broader culture of fear in the company among several other issues. Fairwork takes this study as a positive example of how employers have the power to rapidly improve fairness when they have the information and willingness needed to implement major changes.

Learn more about the Fairwork AI ratings at www.fair.work/ai

THROUGH COLLABORATION WITH FAIRWORK, SAMA HAS MADE 24 SIGNIFICANT CHANGES IN THE PAST YEAR TO THEIR OPERATIONAL MODEL AND BUSINESS PRACTICES, SUCH AS INCREASING THE BASE SALARIES OF ALL EMPLOYEES TO THE RECOMMENDED LIVING WAGE OR CHANGING THE LENGTH OF BASIC CONTRACTS TO IMPROVE EMPLOYMENT SECURITY.

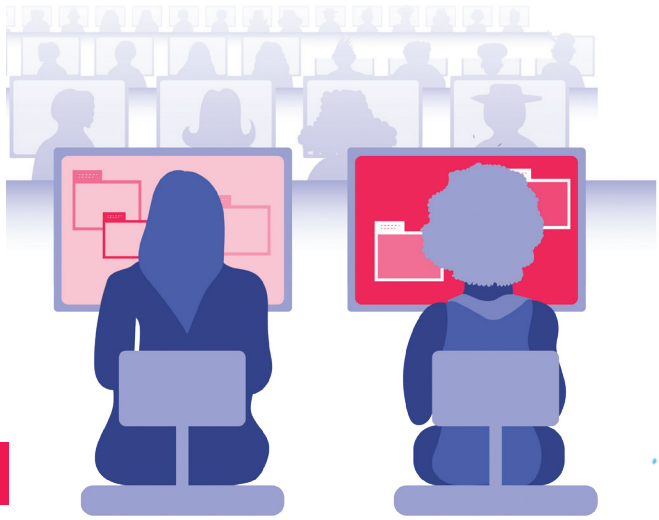


Figure 5. Scorecard for Sama 2023's Fairwork AI rating

Principle	First point	Second point	Total
Principle 1: Fair Pay	● Pays at least the local minumum wage (one point)	● Pays at least a local living wage (one additional point)	2
Principle 2: Fair Conditions	● Ensures safe working conditions (one point)	● Ensures paid leave, and a safety net (one additional point)	2
Principle 3: Fair Contracts	● Provides decent contracts (one point)	○ Provides secure employment (one additional point)	1
Principle 4: Fair Management	○ Treat workers fairly (one point)	○ Creates clear and effective systems for data management, explanations, and appeals (one additional point)	○
Principle 5: Fair Representation	○ Assures freedom of association and the expression of worker voice (one point)	○ Supports democratic governance (one additional point)	○

Total score Fairwork 05/10

Box 1: Can digital sex work be fair?

This year we launched a new project examining four major sex work platforms meditating a variety of types of sex work. Digital sex work on platforms exploded during the pandemic, receiving large-scale media attention as increasing numbers of people turned to this work as lockdowns limited people's working opportunities. Newspaper bylines, documentaries, and social media posts regularly document rags-to-riches stories of everyday people who are earning hugely more than they would in their local labour markets by engaging in digital sex work. Whilst chronically under-researched, what little existing research there is has shown that digital sex work is – just like all other forms of platformised work – marked by chronic precarity and unsafe working conditions. Taking seriously the adage that "sex work is work", we need to ask critical questions on how to incorporate platform sex workers into future debates on digital labour conditions and platform worker protection.

Platform sex workers face many similar challenges to other types of platform workers, including an absence of statutory labour protections; algorithmic control and surveillance within the digital workplace; subordination to both clients and platforms; data protection and privacy risks; and a lack of avenues for collective representation. This is compounded by the fact that sex work remains highly stigmatised, with a disproportionately female and LGBTQIA+ workforce. This means that sex workers face unique vulnerabilities stemming from the specific gendered, historical and social legacies of their work.

Cloudwork Platforms

The Fairwork Cloudwork Ratings 2023 report assesses and scores basic standards of fairness in working arrangements on 15 web-based digital labour platforms according to the five Fairwork Cloudwork Principles.[25]

The platforms studied in this report were selected based on their global reach (such as Freelancer.com, Upwork, Amazon Mechanical Turk, Fiverr and Scale/Remotasks); their position as regional market leaders (such as Workana, Terawork, and Soy Freelancer); and companies focused on specific segments, for instance, academic research (such as Prolific). The survey was completed by 752 workers across 94 countries.

This year, two new platforms were scored: Nigeria-based Terawork, which draws its workforce from across continental Africa, and Elharefa, which operates in countries from the Middle East and North Africa (MENA). Three platforms scored 5 points out of 10. One platform achieved 3 points, two platforms received 2, and five platforms scored one. The Fairwork Cloudwork research has revealed some of the most precarious conditions impact workers active on microwork platforms. Microwork includes services such as data annotation and labelling, video scoring and model evaluation in exchange for very small sums of money. These microwork platforms are often used in the AI development process – to train data sets and test the AI's function. While developments in AI receive public hype and momentum, discourses of slick, frictionless technological solutions free from human labour obscure the vast amounts of work that take place to develop them across some of the platforms we scored this year. The workers behind the design, building and testing of these technological solutions, unfortunately, still face enormous challenges and experience unfair, and invisibilised, working conditions.

THE FAIRWORK CLOUDWORK RESEARCH HAS REVEALED SOME OF THE MOST PRECARIOUS CONDITIONS IMPACT WORKERS ACTIVE ON MICROWORK PLATFORMS THAT PROVIDE SERVICES SUCH AS DATA ANNOTATION AND LABELLING, VIDEO SCORING AND MODEL EVALUATION IN EXCHANGE FOR VERY SMALL SUMS OF MONEY.

In 2023, several cloudwork platforms implemented changes as a result of engagement with Fairwork. Two platforms implemented minimum wage policies, and others adopted measures to address issues related to health and safety, contracts, management, and discrimination. One platform implemented five changes (Terawork) and another adopted four (ComeUp, based in France). In total, 4 platforms adopted a total of 17 changes in the 12 months prior to the report launch in July 2023. We look forward to more changes in the future to improve cloudwork conditions globally.

Learn more about the Cloudwork ratings at www.fair.work/cloudwork

Fairwork Cloudwork Scores 2023

ComeUp	5 /10	
Prolific	5 /10	
Terawork	5 /10	
Appen	3 /10	
SoyFreelancer	2 /10	
Upwork	2 /10	
Clickworker	1 /10	
Elharefa	1 /10	
Fiverr	1 /10	
PeoplePerHour	1 /10	
Scale/Remotasks	1 /10	
Amazon MTurk	–	
Freelancer	–	
Mircoworkers	–	
Workana	–	

Transcription and Translation

The Translation and Transcription scores for 2023 highlight a range of changes to this sector of the platform economy. This research extends our work on Cloudwork by focusing on the significant number of platforms offering language services. The platforms studied were selected based on their global reach (e.g. Rev, Gengo, and Smartcat); and companies focused on specific segments (e.g. companies with a strong focus on machine-translation, like Unbabel); or with unique business models (e.g. Creative Words). In addition to desk research on the platforms and conversations with managers, we conducted a survey with 340 workers between February and September 2023.

Overall, this year's ratings find that most language platforms are still nowhere near close to ensuring the basic standards of fair work expressed in our five Principles, except for the Creative Words platform that met all minimum thresholds, and scored a maximum ten points. Only Translated.com scored eight, and TranscribeMe scored four out of a possible ten. For the other seven platforms, we were unable to evidence that they met more than one of our ten thresholds. For five of these, we could not find evidence that they met any threshold.

Translation and transcription platforms provide important income opportunities for skilled workers in the Global South and are used by a wide range of organisations, especially academic and research institutions. For this reason, Fairwork has produced a Consumer Handbook[26] that will be distributed to major academic and research institutions throughout Europe. By reaching out to some of the most important users of these platforms we hope to increase the impact of our scores and to convince more of these institutions to publicly commit to support fair working conditions by signing the Fairwork pledge (see page 30).

Learn more about the Transcription and Translation ratings at www.fair.work/t&t

PLATFORM IN FOCUS

Creative Words: The First 10/10 Platform

Despite the multiple overlapping crises in the platform economy this year sees the first platform to receive 10 out of 10 in Fairwork ratings. Translation services platform Creative Words met all the thresholds of Fairwork Cloudwork Principles in this year's assessment of translation and transcription services platforms.[27]

In doing so, Creative Words' 10/10 scores and ongoing collaboration with Fairwork proves definitively that the Fairwork Principles are not just achievable, but desireable. Through Fairwork's continued dialogue with Creative Words, the platform has incorporated changes to increase transparency of management decisions, improve access to appeals processes, remove non-compete clauses, and support worker representation. Such changes represent concrete improvements in the lives of workers, allowing them to take part in fair and dignified work.
We highlight some of the key changes made below:

Increased transparency for workers

Through collaboration with Fairwork, Creative Words made an impressive number of changes to their company policies. Many of them consisted of formalising pre-existing good practices, increasing the transparency of decision-making and enhancing the accessibility of appeal processes for workers. In the past, Creative Words had significantly relied on informal guidelines for project management, which meant workers were not always aware of how decisions affecting them were taken, and if or how they could be appealed. Creative Words has now added several explanatory paragraphs to their official documentation, detailing the work allocation criteria, the rate negotiation process, the account deactivation policy, and the relevant appeals processes if a worker wants to issue a complaint, including a step-by-step guide and guidelines for project management decisions. Additionally, Creative Words has improved its non-discrimination policy, which previously only covered illegal discrimination and subjected workers to different standards depending on their country. The new policy removes references to law and establishes a baseline standard for all workers.

Removal of any non-compete clause

A fundamental improvement made by Creative Words since its engagement with Fairwork has been the removal of any non-compete clause from worker contracts. Previously, all documents included a clause that forbade workers from contacting any client they worked for on Creative Words for the entire duration of the contract and the 12 months following its termination. Given their freelancer status, workers were faced with a significant potential reduction in job opportunities, extending well beyond their time working with the company. Creative Words has now removed this restrictive clause, avoiding the unfair reduction of their workers' labour market prospects.

Supporting worker representation

Creative Words has also made important improvements to their policies concerning worker representation. The company made an official commitment to support its workers' efforts to collectively organise and engage in negotiations with a worker body, were one to come forward. Furthermore, the documentation clearly indicates that this process would not be substituted by the arbitration at the International Chamber of Commerce offered in their contracts. Finally, Creative Words committed to involving workers more when changing their company practices. A policy of consulting workers before modifying work allocation methods was introduced, together with a 4-week notification period for any contract changes, allowing workers to make informed decisions.

In sum, we are delighted to see Creative Words making changes to their policies that will directly benefit their workforce. They demonstrate that not only is this possible, but that it is desirable for management and workers alike to achieve a fairer suite of labour conditions. We look forward to Creative Words building upon this strength in the future.

CREATIVE WORDS' 10/10 SCORE PROVES DEFINITIVELY THAT THE FAIRWORK PRINCIPLES ARE NOT JUST ACHIEVABLE, BUT DESIREABLE.

Figure 6. Scorecard for Creative Words 2023's Fairwork Translation and Transcription ratings

Principle	First point	Second point	Total
Principle 1: Fair Pay	Workers are paid on time and for all completed work (one point)	Workers are paid at least the local minimum wage (one additional point)	2
Principle 2: Fair Conditions	Precarity and overwork are mitigated (one point)	Healthy and safety risks are mitigated (one additional point)	2
Principle 3: Fair Contracts	Clear terms and conditions are available (one point)	Contracts are consistent with the workers' terms of engagement on the platform (one additional point)	2
Principle 4: Fair Management	There is due process for decisions affecting workers (one point)	There is equity in the management process (one additional point)	2
Principle 5: Fair Representation	Workers have access to representation, and freedom of association (one point)	There is collective governance or bargaining (one additional point)	2
		Total score	**10/10**

THEME IN FOCUS

Gender and Platform Work

This year, Fairwork published its first investigation into the gendered experiences of platform work. The Gender and Platform Work: Beyond Techno-Solutionism report[28] found that the platform economy does not just reflect gender inequalities – or as its proponents suggest, alleviate them — but rather amplifies them.

The Gender and Platform Work report argues that commonplace practices in the platform economy—such as failing to guarantee a living wage, provide safe working conditions, and tackle gender-based discrimination—risk widening the gender pay gap, reducing workforce participation rates of women and further cementing already persistent gender inequalities.

This is primarily because location-based platform work is segregated into male and female categories. Across Fairwork's research network, we have found women's participation in the platform economy is high in beauty, care, and domestic work, and low in ride-hailing and delivery services, which are dominated by men. Such a division effectively marginalises and excludes workers based on their gender identities from certain sectors of platform work, and leaves those who do not fit in the gender binary vulnerable to even higher levels of discrimination. This is particularly the case for those working in platforms that allocate work and payment based on customer rating. If workers from marginalised communities consistently receive worse ratings than others, such ratings could become a proxy for discrimination that hurts workers' ability to get work and fair pay.[29]

Meanwhile, the traditionally 'feminised' work of beauty, care, and domestic services is largely invisible, taking place within private homes. Platforms often fail to successfully account for and fully monetise this work, leading to workers conducting unpaid work, being inadequately protected from workplace harassment, and suffering abuse as they negotiate the private spaces of clients' homes and offices.

THE GENDER AND PLATFORM WORK REPORT ARGUES THAT COMMONPLACE PRACTICES IN THE PLATFORM ECONOMY—SUCH AS FAILING TO GUARANTEE A LIVING WAGE, PROVIDE SAFE WORKING CONDITIONS, AND TACKLE GENDER-BASED DISCRIMINATION—RISK WIDENING THE GENDER PAY GAP, REDUCING WORKFORCE PARTICIPATION RATES OF WOMEN AND FURTHER-CEMENTING ALREADY PERSISTENT GENDER INEQUALITIES.

When confronted with deep-seated social issues like gender discrimination, many platforms deploy technological solutions to protect workers, such as unilaterally banning female workers from doing jobs perceived to be unsafe or working at night,[30] as well as subjecting them to intrusive and uncompensated surveillance measures to monitor their work. These quick-fix technical solutions can decrease earnings and increase platform control, while doing little to meaningfully keep workers safe.

Against this backdrop, Fairwork's five Principles - fair pay, fair conditions, fair contracts, fair management, and fair representation - are an essential guide for how platforms can do better. We outline exactly how, below:

Fair Pay

Most platforms fail to ensure living wages, leading to workers being forced to work long hours to earn enough to survive. The essential but unpaid domestic labour of living – such as cooking meals, raising children, and taking care of the elderly – disproportionately falls onto women, who end up effectively doing a second shift of work, thus limiting their ability to fully participate in platform work.

The International Labour Organisation (ILO) recognises that minimum wage policies reduce the gender pay gap.[31] Such laws are needed for the platform economy, where initiatives like dynamic pricing only benefit those who have the flexibility to work during night-time peak hours, leading to drastic differences in earnings.

Fair Conditions

The lack of measures mitigating risks and guaranteeing a social safety net represents the reversal of rights available in formal employment, such as safe work conditions, parental leave, sick pay, and insurance. While these issues affect all workers, the high degree of risk associated with platform work and the lack of a social safety net are known to be disabling factors for women to enter the workforce.

Fair Contracts

Many women and gender minorities hold intersecting identity positions, leaving them particularly vulnerable to exploitation. Fair contracts, which are clear and transparent, are thus necessary.

Fair Management

The presence of effective, human-led support systems and processes is associated with platforms that are more accessible to women and gender minorities. Conversely, platforms which rely on rating systems to make decisions around deactivations and pay calculations are known to reflect and amplify social biases, especially for women and gender minorities who face high degrees of social stigma.[32] It is thus imperative that such bias is accounted for and that platforms provide avenues through which workers can dispute ratings. This, alongside meaningful anti-discrimination policies, is necessary to provide equity in the management process and combat discrimination.

Fair Representation

Women and gender minorities often face systematic and structural gendered discrimination while doing platform work, which can only be identified through consultation with one another. Unfortunately, the gendered nature of this discrimination means that workers can end up feeling even more isolated if the stigma is shared by fellow workers as well as clients. It is not enough to ensure that there are mechanisms available for collective voice — these must also be accessible to all workers, including those who are marginalised.

Pathways of change

Fairwork's goal to create a fairer future of work is imperative in the context of a rapidly changing economic and technological landscape and an uncertain future of climate change which threatens to further erode workers rights. Fairwork envisions four pathways to improving working conditions in the platform economy (Figure 6).

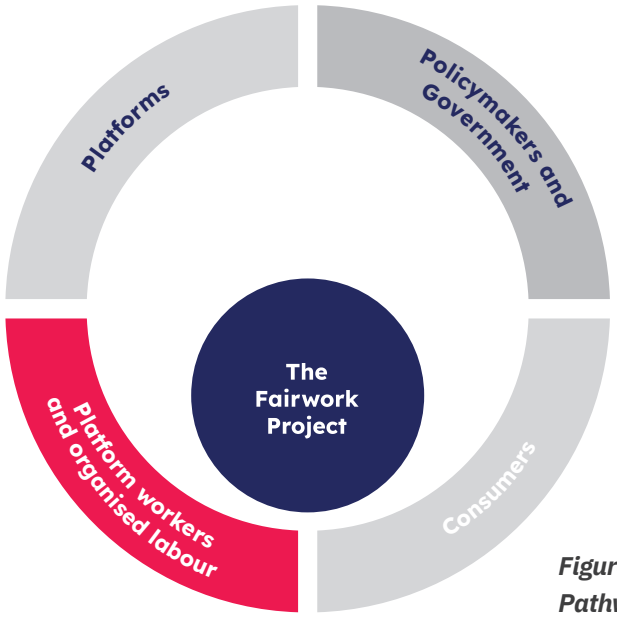


Figure 6. Fairwork's Pathways to Change

1) Supporting Workers and Collective Groups

Workers and workers' organisations are at the core of Fairwork's model. First, our Principles have been developed and are continually refined in close consultation with workers and their representatives. Second, through continual engagement with workers' representatives and advocates, we aim to collectively support workers in asserting their rights and requirements.

Through the workers' centre, Fairwork produces content and reaches out to inform workers about our research and offers additional resources to support worker activism. Workers' centre engagement activities and resources are co-developed closely with local worker associations and representatives to ensure they are aligned with the goals and needs of workers. The goal of the workers' centre is two-fold. First, it aims to translate Fairwork's research into useful resources to support workers in demanding better working conditions. Second, it strives to strengthen worker organising efforts and promote solidarity among and with the workers at the heart of the technological revolution shaping the future of work.

Some long-standing activities of the workers' centre have continued to be developed in 2023. These include a global directory of unions and workers' associations

and a comprehensive list of useful resources and tools for workers and advocates. Both of these resources are available on the Fairwork website.[33],[34] Fairwork also provides workers with an anonymous whistle-blowing form where they can safely share information about the companies rated by Fairwork. This year, Fairwork has also engaged in the following campaigns:

Illustrating the Principles

Fairwork has collaborated with local artists and worker associations to develop a series of illustrations that explain the importance of the five Fairwork Principles. These illustrations have been developed for Colombia, Egypt, Ghana, Indonesia, Philippines, South Africa and the UK. Each set of illustrations takes into consideration the particularities of platform work in these countries. The illustrations aim to be a non-technical introduction to the Fairwork Principles by connecting them to the problems that workers face regularly on the job. These illustrations have been disseminated both virtually and in print form with workers and the general public. They have proven to be a valuable resource for worker organisers in these countries to mobilise around shared objectives.

Figure 8. Example of illustrations being used in India by the Indian Federation of App Based Transport Workers (IFAT).

Common questions pamphlets

Fairwork is co-developing a series of pamphlets that provide answers to common questions faced by workers, such as what to do if they are missing payments or if their profile gets blocked. The objective of this initiative is to support worker associations in disseminating key information to their members and beyond. Currently, we are working with worker associations in Brazil, Kenya and the Philippines, and hope to expand to more countries in the coming year.

Worker meetings

Fairwork has been working to create spaces for workers and worker organisers to gather and strategise around how to best promote their demands to both platform management and regulators. Fairwork has already hosted meetings with workers in Tanzania and Brazil with positive results. Currently, it is working on setting up similar meetings at a regional level, bringing together national worker representatives to develop joint strategies regarding upcoming regulations and

engagement with international platforms operating in multiple countries. We believe these meetings hold the potential for strengthening worker organisations' power by aligning objectives and promoting knowledge exchange.

Platform cooperativism in Latin America

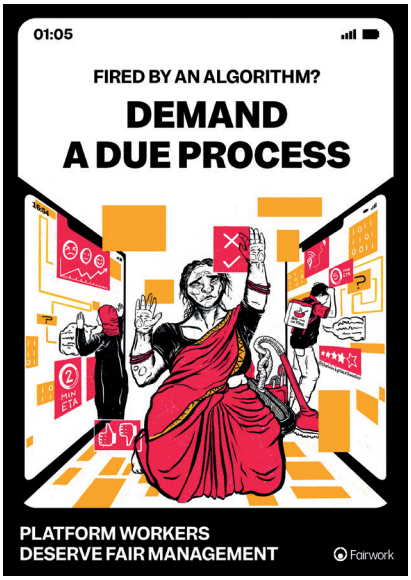
In May 2023, Fairwork held a workshop on Platform Cooperativism in Latin America, which was attended by 125 participants representing various platform solidarity cooperatives from Argentina, Brazil, and Mexico, as well as universities and research centers from Ecuador, Colombia, Chile, Argentina, and the UK. Additionally, multiple social movements from Brazil, Ecuador, and Argentina were also represented.

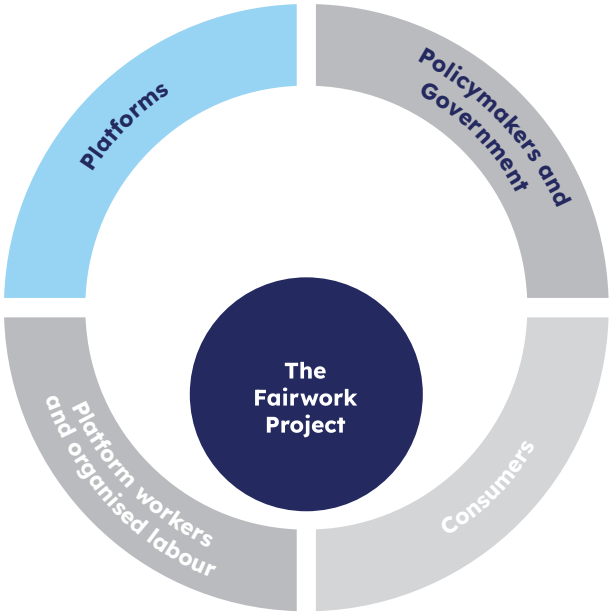
This was followed by a course in late summer for cooperative digital platforms, focusing on topics such as sustainability, governance, technology management, ownership and data. The course was aimed at cooperativists, entrepreneurs, public officials, participants of social movements, members of civil society organisations and academics who are involved in the promotion, strengthening and study of cooperatives, social enterprises and other initiatives of the Popular and Solidarity Economy. More than 40 people participated.

ON 29TH NOVEMBER 2023, FAIRWORK HELD A WORKSHOP ON WORKER REPRESENTATION IN CLOUDWORK DIGITAL LABOUR PLATFORMS. OVER 40 TRADE UNIONS, CONFEDERATIONS, AND WORKERS' ASSOCIATIONS FROM ALL OVER THE WORLD JOINED THE DEBATE.

Worker representation in Cloudwork platforms workshop

On 29th November 2023, Fairwork held a workshop on worker representation in cloudwork digital labour platforms. Over 40 trade unions, confederations, and workers' associations from all over the world joined the debate. The goal was to highlight specific challenges faced by cloudworkers to freely associate and bargain with online remote work platforms. At the end of the event, the Fairwork team suggested new research activities and volunteered to collaborate with trade unions on events, courses, and other initiatives to discuss the realities and challenges of cloudworkers. The recommendations were well received by the attendees and new events will be held in 2024, allowing unions to access a space in which to discuss this crucial topic.





2) Actions by Platforms

We engage with companies directly to engage them to improve working conditions. Since engaging with Fairwork, the companies Fairwork rates are becoming increasingly aware of the importance of accountability mechanisms like the Fairwork framework.

By guiding platforms with the Fairwork Principles, we aim to work with them to improve their practices and policies to provide better job and income opportunities for their workers, while building a safer and fairer business. As a result of this engagement, a wide range of companies have agreed to make changes to their working conditions, resulting in 131 positive changes at platform companies this year. An in-depth analysis of these changes is presented on page 9.

PLATFORM COMPANIES HAVE MADE 131 POSITIVE CHANGES AS A RESULT OF ENGAGING WITH FAIRWORK.

Platform manager meetings and commitment to change

Fundamentally, any changes platforms make have the potential to tangibly improve the lives of hundreds, if not thousands of workers. Hence, from Fairwork's point of view, any opportunity to bring about further changes in the platform economy is crucial.

This year, Fairwork has organised a series of regional meetings with managers of digital labour platforms operating in each region. As a complement to our bilateral engagement with platforms during the scoring process, these meetings aim to create additional opportunities to continue the conversation on working conditions in the platform economy.

So far, Fairwork has organised four platform management meetings. The first was for platform managers from the African continent, held in Mauritius in May 2023[35]; the second was for managers of platforms operating in Europe, held in Greece in July 2023; the third was for managers of Cloudwork platforms, held in Berlin in December 2023. The fourth and final meeting was held for platform managers that use subcontracting labour models, also in Berlin in December 2023. A fifth meeting, for managers of platforms operating in Latin America will be held in Brazil in Feburary 2024. In Feburary 2024, a sixth meeting will also be held for managers of platforms operating in Asia in Singapore

The platforms invited to join the talks operate across platform sectors and have a variety of operating models, but have all made commitments to improve their labour policies. Thus, these meetings have allowed platforms to engage in peer-learning and

collective knowledge exchange with other like-minded organisations. Such meetings allow platform managers to openly discuss the business impact of certain changes to their operational models to improve working conditions. The meetings have demonstrated that platforms are open to learning from the best practices of other platforms and are eager to brainstorm solutions to the unique operational challenges they experience whilst developing improvements to the working conditions.

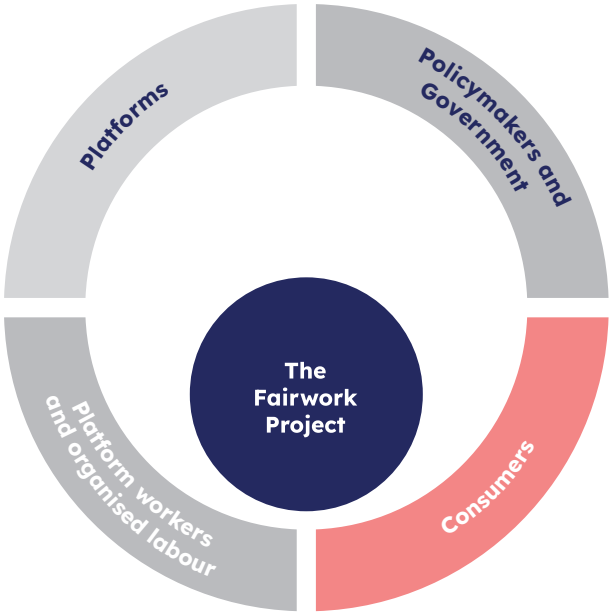
Fair by design

Our engagement with platforms includes more than just the most established players in the market. We also support new platforms entering the market by providing information on best practices regarding working conditions in the sector.

To this end, Fairwork researchers have supported a workshop organised by the Resolution Foundation in April 2023 for gig work start-ups and stakeholders from the government, impact investment, and non-profit sectors. This workshop introduced participants to the five Fairwork Principles, prompted them to consider how they could integrate each of the Principles in their work, and discussed the challenges of implementation in the real world of work. The workshop thus aimed to embed Fairwork's Principles in the design and development of new labour platforms and to create long-lasting positive change. Fairwork researchers continued their engagement with the Resolution Foundation, by organising a workshop at the Worker Tech Conference 2023 held in London in November 2023, to facilitate discussions on the major issues currently facing workers in the platform economy, and how fairer solutions could be achieved.

Fairwork is also designing and compiling a collection of resources such as a list of best practices and a checklist to assess what constitutes 'fair' terms and conditions for established and emerging players in the platform economy. These resources are scheduled to be released in 2024, with the aim of encouraging further pro-worker changes and improvements in working conditions.

Last but not least, Fairwork is currently working on transforming its Principles for fair work into a self-assessment tool that will enable platforms currently not covered by our rating to self-evaluate their practices against the Fairwork Principles, and receive feedback on shortcomings and ways to improve.



4) Mobilising consumer attitudes

Platform work has disrupted the economy by providing unprecedented levels of efficiency and convenience to users. However, consumers and organisations that make use of these services rarely consider the human or environmental costs – an issue often compounded by the technical systems developed and deployed by platforms that actively invisibilise and obscure the worker. Lacking the visibility of, and information about, working conditions consumers are ill-equipped to make more ethical decisions; particularly in the complex globalised media environment that sees the stories of platform workers lost among the larger stories of society lurching from global crisis to global crisis. Fairwork strives for a future where the benefits provided by these innovations are not only enjoyed by the user but also by the workers across the supply chain. Our independent ratings provide consumers and organisations with the information they need to make more informed decisions. We believe that given this information, most would choose to support the most ethical platforms, and turn away from exploitative and unfair labour practices.

Consumer surveys

The willingness of consumers to support decent work in the platform economy has been confirmed by surveys commissioned by Fairwork in Brazil, Colombia, the UK, and most recently India. These consumer surveys have found overwhelming support for actions to improve working conditions and strengthen regulation in the platform economy.

The consumer survey in India received responses from 963 consumers in 12 cities, who used 12 platforms. The survey found widespread support for improving working conditions within the platform economy. 93% of respondents in large cities said they would be more likely to use platforms that are independently certified as treating their workers fairly. This finding is reflective of the increasing importance that consumers are placing on ethical and fair labour practices when choosing services like those offered by platforms. Box 2 provides more details on the survey results.

Public engagment

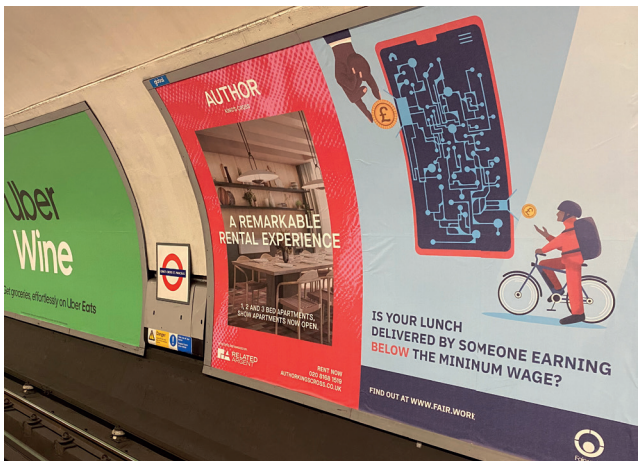
Fairwork informs and mobilises consumers towards supporting fairer working conditions in the platform economy and AI supply chain. Beyond publicising our company ratings, Fairwork has been working on multiple initiatives targeting consumers over the past year. This included promoting ethical consumption practices around key dates such as Valentine's Day and Labor Day, as well as debunking myths around the platform economy and the role of regulations. Fairwork has also placed billboards in key locations of the largest cities in Bosnia and Herzegovina, the UK, Ghana, Brazil and Germany. In the UK, we focused on the theme of algorithmic management and low pay. We aimed to

CONSUMER SURVEYS HAVE FOUND OVERWHELMING SUPPORT FOR ACTIONS TO IMPROVE WORKING CONDITIONS AND STRENGTHEN REGULATION IN THE PLATFORM ECONOMY. IN INDIA, 93% OF RESPONDENTS IN LARGE CITIES SAID THEY WOULD BE MORE LIKELY TO USE PLATFORMS THAT ARE INDEPENDENTLY CERTIFIED AS TREATING THEIR WORKERS FAIRLY.

inform bystanders of how delivery workers, and other app-based workers, might not reach the minimum wage due to the opaque and dynamic pricing structures that many platforms use.

Fairwork has also developed a guide for fair consumption of platform-mediated services. The guide consists of five simple steps that consumers can take to support platform workers. Fairwork aims to launch this guide as an international petition in January 2024, asking consumers around the world to commit to following these steps and take a proactive approach towards improving the lives of platform workers.

Fairwork's billboards in TfL's London Underground, covered multiple central London locations. The work highlighted the pay inequalities and opacities we find in many labour platforms and raised awareness around worker payment.



Box 2: What do consumers in India think about the platform economy?

Fair Pay: The majority of the consumers surveyed agreed that workers need to be paid a living wage after costs. They supported reducing platform commissions, raising consumer delivery fees, increasing tipping, and the introduction of government regulation that would ensure that all workers receive a living wage

Fair Conditions: 80 percent of the consumers surveyed knew that platform workers often work long hours, drive in adverse weather, and deal with abusive consumers. A significant percentage strongly agreed that platforms and government regulation must strive to ensure safe working conditions, including health and accident insurance and amenities for workers' safety and rest.

Fair Contracts: 66 percent of the consumers surveyed strongly agreed that the government must act against platforms that repeatedly fail to offer their workers either fair pay or fair conditions. Also, 83 percent in large cities said that platform workers should not be classified as self-employed.

Fair Management: A majority of consumers surveyed (72% percent) strongly agreed that regulation is needed for the work-allocation process, and to protect workers against discrimination.

Fair Representation: 91 per cent of consumers agreed that platforms must discuss the shared concerns of workers. They also agreed that workers should have a say in the decisions affecting them, the right to form collective groups, and that platforms must be willing to recognise and negotiate with these collective worker groups.

More details about the Fairwork India Consumer survey can be found at **fair.work/india**

Fairwork Pledge

Another key element of our consumer-oriented pathway of change is the Fairwork Pledge. This initiative attempts to leverage the power of organisations' procurement, investment, and partnership policies to support fairer platform work. Organisations like universities, schools, businesses, and charities that use platform labour can make a difference by supporting the highest scoring labour platforms guided by our five Principles of fair work. Organisations who sign the pledge get to display our badge on company materials.

The pledge has two levels:

1. Fairwork Supporters publicly demonstrate their support for fairer platform work and commit to disseminating Fairwork resources such as Fairwork reports and ratings among their members, employees and affiliates to support them in making informed and socially responsible decisions when using digital labour platforms.
2. Fairwork Partners go one step further by committing to disseminating Fairwork resources internally and, in addition, to concrete and meaningful changes in their own practices, for example, by committing to using better-rated platforms where there is a choice.

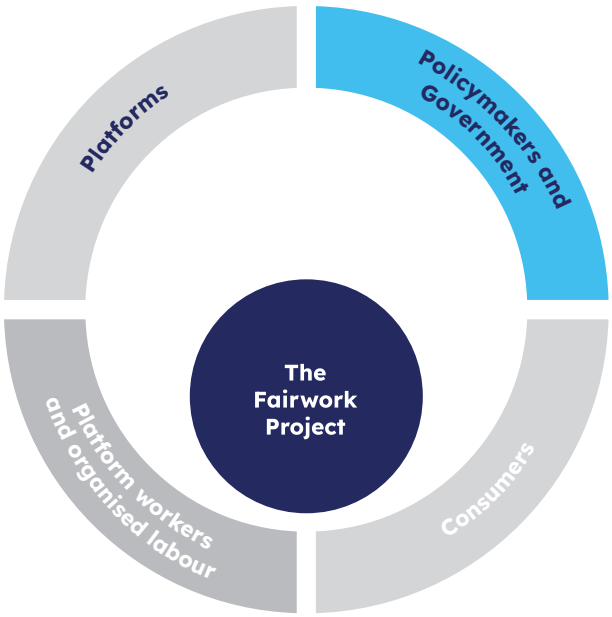
We are proud to say that up to now, 48 organisations have signed up as Fairwork Supporters, and 14 organisations have signed up as Fairwork Partners.

WE ARE PROUD TO SAY THAT UP TO NOW, 48 ORGANISATIONS HAVE SIGNED UP AS FAIRWORK SUPPORTERS, AND 14 ORGANISATIONS HAVE SIGNED UP AS FAIRWORK PARTNERS.

The Fairwork Pledge is open to all kinds of organisations, including research and training institutions, businesses, investors and public administrations, for example. Interested organisations are invited to contact us at **www.fair.work/pledge**

Fairwork partners

Fairwork supporters



3) Engagement with Policymakers and Regulators

Our country teams are in regular contact with policymakers and legislative bodies to support them in making evidence-based decisions regarding the regulation of the platform economy, and to advocate for the rights and protection of all platform workers.

Key policy engagements by the Fairwork team in 2023 include:

Africa and the Middle East

Government-run initiatives to improve platform work are powerful tools to improve working conditions. Fairwork Egypt has been in long-standing discussions with Egypt's Ministry of Social Solidarity over their "Your Road is Safe" initiative.[36] The initiative is making important strides in improving working conditions of couriers including, but not limited to, lower interest financing opportunities to assist couriers to buy vehicles at a lower cost (Fair Pay); free safety training, equipment, and rest stops (Fair Conditions); and mechanisms for collective representation to facilitate dialogue amongst workers, and to offer them a space to raise their voice in a collective manner (Fair Representation). The Ministry is conducting roundtable discussions with major delivery platforms in Egypt (InDrive, Mrsool and Talabat) on ways to expand the initiative, specifically on measures to help with financing and loans schemes. Fairwork is writing a policy brief to assess the initiative and to provide recommendations based on the five Fairwork Principles.

Fairwork has also worked with unions to advocate for better working conditions with government bodies. In Kenya, the Transport Workers Union (TAWU) contacted Fairwork Kenya on submissions to the Ministry of Transport for the pricing mechanism for ride-hailing platforms. TAWU, in collaboration with the Automobile Association of Kenya, prepared a document for calculating rates based on fixed and operating costs. The bill specifically asked about a computation formula for wages for drivers based on Fairwork's Principle 1 (Fair Pay). We highlighted the fixed, operational, and other costs we consider when collecting evidence from platforms and their workers. We explained that the burden of proof when we score platforms is on the platform to show a policy that all workers meet the minimum wage after all work-related costs. As a result, a memorandum has been submitted to the government, opening dialogue with the Ministries of Labour and Transport in Kenya. Specifically, the memorandum argued that there is a need to ensure that workers are compensated for all labour time, including fixed and operational costs.

We are also building relationships with government bodies to advocate for better working conditions for marginalised platform workers. For instance, Fairwork Uganda participated in the Ugandan Ministry of

Gender, Labour and Social Development's workshop on "Understanding and improving women's work on digital platforms in Uganda." This invitation came after the release of the Fairwork Uganda Report, which focused specifically on the gendered experiences of gig work, and which was attended by representatives from the Ugandan government.

Asia

This year the Fairwork India team has engaged closely with the Rajasthan government over the Rajasthan Platform Based Gig Workers (Registration and Welfare) Act, 2023.[37] This bill is the first legislation produced in India with the aim of providing gig workers with a social safety net.

Fairwork India took part in advocacy efforts around issues faced by gig workers, in coordination with organisations and individuals across India who work on labour rights and advocate for a legal framework of social security for platform-based gig workers. This was followed by a public meeting where app-based workers from Uber, Ola, Porter, Swiggy, Zomato and others spoke about their everyday challenges as gig workers, including abusive customers, accidents, loan instalments they could not keep up with, unreasonably long hours, and more. The Fairwork Principles were shared, and copies of the reports distributed. A few days later the Chief Minister announced a welfare fund for gig workers, with seed funding from the state of Rs. 2 billion, or approximately $24million USD.[38]

The Fairwork team is now consulting with the Tamil Nadu Planning Commission (TNPC) to develop a policy framework for gig workers in that state.

Similarly, the Fairwork Pakistan team shared insights on the platform economy and presented their draft legislation to safeguard the rights of platform workers at a consultation held by the Pakistan Institute of Parliamentary Services (PIPS).[39] This consultation incorporated a diverse group of stakeholders, including two senators, the Director General of the Pakistan Institute of Parliamentary Services (PIPS), government officials, labour rights advocates, International Labour Organisation (ILO) representatives, worker representatives, and academic experts.

Box 3: Fairwork Policy Engagements in Asia

In Southeast Asia, the Fairwork Philippines, Indonesia, and Singapore teams were consulted for the 2023 ASEAN Employment Outlook: The Quest for Decent Work in Platform Economy: Issues, Opportunities and Ways Forward. This report targets labour ministers and other policymakers across the Southeast Asian region to commit to promoting decent work in the platform economy. The Fairwork global initiative was referenced for setting a "benchmark that stakeholders can use to assess platform labour practices" and that "international, regional, and local communities can adopt."

Europe

The Fairwork Serbia team is in discussion with the Ministry for Labour, Employment, Veterans and Social Policy with regard to assessing and improving platform work in Serbia. The team has also been supporting the efforts of the Road Traffic Safety Agency to improve conditions for platform workers in urban areas.

Meanwhile, the UK team has been in discussion with MPs to encourage future policy changes in the UK labour market to support platform workers.

Box 4: Fairwork Policy Engagements in Europe

Fairwork has been following closely the negotiation process of the EU Directive on Platform Work, commenting and advising on the strengths and weaknesses of the different proposals. Our recent policy brief explains how despite making crucial improvements, the latest proposal for the Directive still fell short of guaranteeing fair and decent working conditions. We identified the following areas for improvement: recognising employment status should be independent of platforms, clearer regulations for subcontractors, entitling all workers to rights and protections, fostering collective representation, and ensuring that contracts are fair. Beyond these comment pieces, Fairwork has engaged directly with relevant stakeholders in the EU Parliament, Commission, the Eurofound, ETUC and ETF to advise on how to ensure the directive is beneficial for all platform workers.

Americas

In the Americas, Fairwork has been working closely with national and local politicians to advocate for platform workers' rights. Fairwork Brazil engaged with the new labour government's tri-partite working group on regulatory responses to workers. The government is currently working on a bill to protect workers' rights.

Similarly, in the United States, Senator Ed Markey's office drew on Fairwork AI Principles for a letter sent by him and other US senators (Bernie Sanders, Elizabeth Warren, Jamaal Bowman, Katie Porter, Mark Pocan, Ron Wyden and Pramilia Jayapal) to big-tech CEOs.

Meanwhile, in Peru, the Fairwork team met with the Minister of Labor and the Vice Minister for the formation of a Working Group that recommends improvements to the platform economy. The team also met with Sigrid Bazán, the Congresswoman of the Republic and President of the Labor Commission.

In Ecuador, the Fairwork team was invited by Congresswoman Johana Ortiz to present the Fairwork project and present policy recommendations in the Congress. The team also provided advice to the municipality of Loja on the issue of security in public spaces with a focus on delivery workers.

The Colombia team provided evidence to the Ministry of Labour about the precarious conditions of gig workers in Colombia, and met with union representatives, congressmen and congresswomen, to discuss the new government plan for labour reform to promote better conditions in platform work.

Additionally, country teams have been active in empowering workers and academics to reach out to government. Fairwork Brazil helped to create the Brazilian Platform Work Researchers' Forum and workers' associations by attending meetings and events discussing the challenges to the new regulation. The Fairwork Peru team also supported the creation of a platform workers' association, in collaboration with one of the main trade union confederations.

Box 5: Fairwork Policy Engagements in Latin America

Regionally, in Latin America Fairwork engaged with the Parlasur Labour Committee, which operates under Mercosur, the South American trade body that undertakes policy-making at a regional level. A joint one-day seminar was organised in May, gathering Parlasur MPs and researchers to discuss the challenges facing platform workers. The Fairwork team followed these conversations and was invited by the Committee to develop new joint initiatives on the platform economy in 2024.

International

Internationally, Fairwork has interacted regularly with the International Labour Organization, including teaching a seminar on platform work in their Gender Academy and presenting Fairwork Tanzania's policy brief on working conditions in the country in a workshop at Geneva in December.

Fairwork has also presented findings at the World Bank's Labour GSG event titled "Regulating platform-based work in developing countries: How to balance job opportunities and workers' protection." This presentation provided insights on how people whose work is mediated by platforms perceive their work, specifically focusing on low pay, long working hours, and limited power to negotiate rates.
Fairwork emphasised the role of unsafe working conditions, discrimination and unfair management and highlighted how the Fairwork Principles provide a benchmark of fair work for companies, workers, customers and policymakers. The audience included members of the World Bank, the Trade Union Congress, the US Department of Labor and other stakeholders on labour and platform work.

Pro-worker Changes

Fairwork does not just observe working conditions within the platform economy, but it also engages closely with companies to improve these conditions.

In 2023, we continued our collaboration with Glovo to improve their business practices by advising them on the design of their Couriers Pledge and providing feedback on its implementation. As part of this global initiative, Glovo has introduced an anti-discrimination policy and reporting mechanism and improved its risk-related policy regarding the training and retraining of workers. It established cooperation with the Auto-moto Union of Serbia, with whom they now organise training, and arrange adequate third-party insurance for workers, enabling workers to get their pay for up to 30 days while unable to work due to injuries. This insurance does not only cover sick pay, but also accidents, parental leave and third party liabilities. Another initiative they developed was the Ambassador programme, which enables workers to participate in discussions with the management and raise questions on the issues they face. While these efforts have already had positive impacts for Glovo couriers worldwide, Fairwork is in regular contact with Glovo to refine the goals of the Couriers Pledge and to identify challenges of its implementation in light of the regular Fairwork ratings.

AS PART OF THIS GLOBAL INITIATIVE, GLOVO HAS INTRODUCED AN ANTI-DISCRIMINATION POLICY AND REPORTING MECHANISM AND IMPROVED ITS RISK-RELATED POLICY REGARDING THE TRAINING AND RETRAINING OF WORKERS.

Below are examples of the type of changes we have been able to encourage platforms to implement in 2023.

Principle 1: Fair Pay

Workers in the platform economy across the globe report deep concerns surrounding their payment at work. Mostly classified as 'self-employed', they are not protected by the income protection of more traditional forms of full employment that ensure a minimum wage. Platform workers frequently log into their apps every day without knowing if they will earn enough to make ends meet. Issues with payment are often the most significant problems at the forefront of workers' minds. With that in mind, we are delighted that platforms work with us to bring positive change to make their payment systems fairer.

In Brazil, the food delivery platform, AppJusto launched a cost calculator for their workers to help them estimate their annual expenses after consultations with us. The calculator takes into account factors such as the type of vehicle, number of deliveries, distance travelled, time spent, and weekly expenses for food, phone, fuel, maintenance, and fees. This tool allows workers to have a better understanding of how much they are earning per job, a vital resource in the platform economy where workers are often unaware of the total costs associated with their work. By having this information, workers can better understand their payment levels, compare it with their needs, and have a more informed discussion about possible raises with the platform management. AppJusto additionally guarantees that all workers will earn at least the minimum wage per hour.

Fairwork's engagement with platforms has resulted in a total of 17 changes made in 2023 to guarantee workers' minimum or living wages.

Principle 2: Fair Conditions

Platform work is often dangerous, with workers needing to operate in a variety of climatic conditions, work through traffic-filled city streets, or in the homes of clients, and expend themselves for long hours to earn enough money. Their self-employment status also frequently means they are unable to access sickness pay, and must provide all of their own equipment and insurances. This makes workers incredibly precarious.

To make positive changes in relation to worker conditions, Stuart (UK) introduced a new, industry leading insurance policy for their couriers that provides a wide range of benefits with very low thresholds for payouts. This includes sickness and injury insurance, in addition to a broader range of benefits including death benefits, maternity/paternity pay (including compassionate leave in the tragic case of stillbirth), and free online access to a private GP, physiotherapist, 24/7 mental health service, and six counselling sessions. Courier work is undoubtedly dangerous, but this new set of insurance policies shows that platforms can protect their workers when accidents happen, and can actively support their physical and mental health.

This year, 23 such changes were made in total among the platforms we assessed, to reduce risks and guarantee their workers a social safety net.

Principle 3: Fair Contracts

Workers who are unemployed or underemployed may join the platform economy to make ends meet, however, the terms and conditions for their labour are often in languages that are not comprehensible to them, and might not be not subject to the laws of the country in which they operate. Often, workers end up signing these Terms and Conditions (T&Cs) out of desperation to earn a primary or secondary income. However, because these T&Cs are often signed online, workers may struggle to access them for future reference, and there usually are no clear instructions about the data being collected about workers.

The Paisha platform translated its T&Cs to the local language, Swahili, to improve the comprehensiveness and accessibility for its workers. This will enable workers to easily understand the terms of their labour agreement, refer to it if required, and understand the platform's responsibility to its workers and vice versa. In addition, the platform included a privacy policy, detailing the kinds of data being collected about these workers, and how this information is kept safe. This makes workers feel safer about the information they share on the platform.

In total, 30 changes were made to platform policies on contracts in 2023.

Principle 4: Fair Management

Too often, platforms recruit women and marginalised groups but fail to pay attention to how to retain them. Women workers, hence, find themselves in situations where they are isolated and marginalised. It is thus not surprising that in Fairwork's interviews with women, many report feeling discriminated against and not welcome on their platforms. Indian ride-hailing platform BluSmart is using Fairwork Principle 4.2 to help create a more equitable work environment. It has instituted an anti-discrimination policy, a diversity and inclusivity policy, and a technology audit policy aimed at improving their use of algorithms to benefit their drivers. They have also consulted women drivers to ascertain their working hours and other concerns and subsequently revamped safety measures for them.

In 2023, 36 changes were made to platform management policies.

Principle 5: Fair Representation

While points for fair represention are rarely awarded in comparision to the other four Principles, platforms are beginning to make changes to support workers in their efforts to collectively organise and negotiate improved conditions. This demonstrates that – despite platform narratives that suggest it is impossible – worker organisation and representation is both something workers want, and which platforms can provide.

In Egypt, Orcas has officially stated that if a group of workers were to associate and seek collective representation with the company that they would recognise this and collaborate with them. Last year, we saw a similar promise from the UK's PedalMe. Within the past 12 months, Pedal Me workers have unionsed and are now exploring how to create a working relationship with PedalMe to ensure worker representation continues in the future. We hope to see other platforms continue this trend.

Only 8 platforms made changes under Principle 5 in 2023.

Cloudwork

Most Cloudwork platforms lack policies that guarantee a minimum wage. This means that workers contend with uncertainty and insecurity about how much they are earning per job, while lacking protections from being underpaid. However, Fairwork's engagement with the freelance platforms TerraWork and ComeUp, has led to both platforms adopting minimum wage policies for their workers, allowing these workers to benefit from enhanced income security. This introduction of minimum wage policies by Cloudwork platforms is an encouraging development.

In total, 17 changes were made to the policies of Cloudwork platforms this year, across all five Principles.

Conclusion

This is a crucial juncture in the evolution of the digital economy. As business models change, technology evolves and the climate crisis threatens, Fairwork's research in 2023 demonstrates that fair and decent working conditions are not just possible but need to be the norm for all workers.

Fairwork's Principles for location-based work, cloudwork and for companies developing or implementing AI systems, all envision and articulate what these minimum working conditions are, and set out a concrete set of actions for companies to take to meet them.

Crucially, we continue to see that decent work requires platforms to make commitments by creating and implementing policies around pay, conditions, contracts, management and representation. Whilst the logic of the market would suggest that platforms should improve by their own volition, the sheer vulnerability of platform workers, combined with poor labour market conditions and a tech financing crisis have precipitated a worsening of conditions in many respects. Indeed, as Fairwork has shown, if left unchecked, the platform economy does not just have the potential to exploit its workers but can also set us back in terms of gender empowerment, as it crystallises inequities such as gender segregation, wage gaps and reduced workforce participation rates for women and gender minorities. In sum, left to their own devices, it is clear that not all platforms will look to improve the fairness of the work they offer as a key priority. Set against this backdrop, workers, consumers and governments are becoming increasingly sceptical of the meagre benefits many platforms offer as a salve to this decline - such as small bonuses, or tokenistic hirings of marginalised individuals in a nod towards fairness in the workplace - and are beginning to demand a deeper, more structural change.

This change appears to be more challenging now than ever; The legacy of COVID-19, combined with an international cost-of-living crisis, high interest rates, and geopolitical uncertainty have contributed to the perfect storm for platform firms to be tested. With money now more expensive to borrow than in recent years and a move toward less risky assets for large investors, platforms are being forced to reduce burn rates and show greater potential for profitability. Outsourcing the demands for cost-cutting to workers could lead to the deterioration of working conditions and lower pay. Indeed, this practice is not uncommon in the platform economy, where companies often leverage self-employment status and other strategies to shift business risks onto individual workers. However, this does not need to be the case. We have seen many platforms opt-in to making positive changes to their labour practices and conditions in an effort to make platform work more sustainable for workers as well as companies. This kind of change is needed if the platform economy is to remain a viable solution for all in future years.

Experience has shown that Fairwork's Principles provide a pathway to achieve decent work in this fast-expanding sector. Such decent work is non-negotiable, and policy makers, consumers, workers and international organisations are beginning to come together to articulate demands for fairer treatment. While more needs to be done to guarantee better working conditions, continued engagement with Fairwork does lead to improved conditions in the platform economy. Our long-standing dialogues with workers are key to understanding the contours of this rapidly changing sector, and understanding the challenges, opportunities and oft-ignored dimensions of working as a platform worker. The number of pro-worker changes this year signals that Fairwork has a key role to play in stemming the erosion of workers' rights. However, the vast, and increasing, gap between platform scores and minimum standards of decent work means that it is increasingly imperative for policymakers to step up to protect the world's platform workers.

APPENDIX I

Principles and Methodology

Methodology overview

The Fairwork project uses three approaches to effectively measure fairness of working conditions at digital labour platforms: desk research, worker interviews and surveys, and interviews with platform management.[40] Through these three methods, we seek evidence on whether platforms act in accordance with the five Fairwork Principles.

We recognise that not all platforms use a business model that allows them to impose certain contractual terms on service users and/or workers in such a way that meets the thresholds of the Fairwork Principles. However, all platforms have the ability to influence the way in which users interact on the platform. Therefore, for platforms that do not set the terms on which workers are retained by service users, we look at a number of other factors including published policies and/or procedures, public statements, and website/app functionality to establish whether the platform has taken appropriate steps to ensure they meet the criteria for a point to be awarded against the relevant Principle.

In the case of a location-based work platform, we seek evidence of compliance with our Fairwork Principles for location-based or 'gig work' platforms, and in the case of a cloudwork platform, with our Fairwork Principles for cloudwork platforms.

More information on Fairwork's Principles can be found at **fair.work/Principles**

Desk research

Each annual Fairwork ratings cycle starts with desk research to map the range of platforms to be scored, identify points of contact with management, develop suitable interview guides and survey instruments, and design recruitment strategies to access workers. For each platform, we also gather and analyse a wide range of documents including contracts, terms and conditions, published policies and procedures, as well as digital interfaces and website/app functionality. Desk research also flags up any publicly available information that could assist us in scoring different platforms, for instance the provision of particular services to workers, or the existence of past or ongoing disputes.

The desk research is also used to identify points of contact or ways to access workers. Once the list of platforms has been finalised, each platform is contacted to alert them about their inclusion in the annual ranking study and to provide them with information about the process. All platforms are asked to assist with evidence collection as well as with contacting workers for interviews.

Platform interviews

The second method involves approaching platforms for evidence. Platform managers are invited to participate in semi-structured interviews as well as to submit evidence for each of the Fairwork Principles. This provides insights into the operation and business model of the platform, while also opening up a dialogue through which the platform could agree to implement changes based on the Principles. In cases where platform managers do not agree to interviews, we limit our scoring to evidence obtained through desk research and worker interviews.

Worker interviews

The third method is interviewing platform workers directly. A sample of 6-10 workers are interviewed for each platform. These interviews do not aim to build a representative sample. They instead seek to understand the processes of work and the ways it is carried out and managed. These interviews enable the Fairwork researchers to see copies of the contracts issued to workers, and learn about platform policies that pertain to workers. The interviews also allow the team to confirm or refute that policies or practices are really in place on the platform.

Workers are approached using a range of different channels. For our 2023 ratings, this included, in addition to our tried and tested participant recruitment methods, Facebook and Twitter advertisements and snowballing from prior interviews. In all these strategies informed consent was established, with interviews conducted both in person and online.

The interviews were semi-structured and made use of a series of questions relating to the 10 Fairwork (sub) Principles. In order to qualify for the interviews, workers had to be over the age of 18 and have worked with the platform for more than two months.

Putting it all together

This threefold approach provides a way to cross-check the claims made by platforms, while also providing the opportunity to collect both positive and negative evidence from multiple sources. Final scores are collectively decided by the Fairwork team based on all three forms of evidence. Points are only awarded if clear evidence exists on each threshold.

How we score

Each of the five Fairwork Principles is broken down into two points: a first point and a second point that can only be awarded if the first point has been fulfilled. Every platform receives a score out of 10. Platforms are only given a point when they can satisfactorily demonstrate their implementation of the Principles. Failing to achieve a point does not necessarily mean that a platform does not comply with the Principle in question. It simply means that we are not – for whatever reason – able to evidence its compliance.

The scoring involves a series of stages. First, the in-country team collates the evidence and assigns preliminary scores. The collated evidence is then sent to external reviewers for independent scoring. These reviewers are both members of the Fairwork teams in other countries, as well as members of the central Fairwork team. Once the external reviewers have assigned their scoring, all reviewers meet to discuss the scores and decide final scoring. These scores, as well as the justification for them being awarded or not, are then passed to the platforms for review. Platforms are then given the opportunity to submit further evidence to earn points that they were initially not awarded. These scores then form the final annual scoring that is published in the annual country Fairwork reports.

APPENDIX II

Country Ratings

AMERICAS

Brazil 2023

AppJusto	3/10
iFood	2/10
Parafuzo	1/10
99	-
Americanas Entrega Flash	-
GetNinjas	-
Lalamove	-
Loggi	-
Rappi	-
Uber	-

Colombia 2023

Hogarú	8/10
AseoYa	7/10
Aux	6/10
Cabify	6/10
Didi	-
Didi Food	-
InDrive	-
Mensajeros Urbanos	-
Picap	-
Rappi	-
TuAly	-
Uber	-

Ecuador 2023

DigiTaxi	5 /10	●●●●●○○○○○
AzuTaxi	4 /10	●●●●○○○○○○
Cleon App	3 /10	●●●○○○○○○○
PedidosYa	1 /10	●○○○○○○○○○
SuperEasy	1 /10	●○○○○○○○○○
Didi	-	○○○○○○○○○○
InDrive	-	○○○○○○○○○○
Rappi	-	○○○○○○○○○○
Tadá	-	○○○○○○○○○○
Uber	-	○○○○○○○○○○

Peru 2023

Cabify	1 /10	●○○○○○○○○○
Urbaner	1 /10	●○○○○○○○○○
Chazki	-	○○○○○○○○○○
Didi	-	○○○○○○○○○○
Didi Food	-	○○○○○○○○○○
inDrive	-	○○○○○○○○○○
inDrive Entregas	-	○○○○○○○○○○
PedidosYa	-	○○○○○○○○○○
Rappi	-	○○○○○○○○○○
Uber	-	○○○○○○○○○○

Mexico 2023

Cabify	-	○○○○○○○○○○
Didi	-	○○○○○○○○○○
Didi Food	-	○○○○○○○○○○
inDrive	-	○○○○○○○○○○
Jokr	-	○○○○○○○○○○
Mercado Libre	-	○○○○○○○○○○
Rappi	-	○○○○○○○○○○
Uber	-	○○○○○○○○○○
Uber Eats	-	○○○○○○○○○○

United States 2023

Alto	2 /10	●●○○○○○○○○
Bluecrew	2 /10	●●○○○○○○○○
Papa	2 /10	●●○○○○○○○○
DoorDash	-	○○○○○○○○○○
EatStreet	-	○○○○○○○○○○
GrabHub	-	○○○○○○○○○○
Handy	-	○○○○○○○○○○
Instacart	-	○○○○○○○○○○
Lyft	-	○○○○○○○○○○
Shipt	-	○○○○○○○○○○
TaskRabbit	-	○○○○○○○○○○
Uber	-	○○○○○○○○○○
Wonolo	-	○○○○○○○○○○

ASIA

Bangladesh 2023

Daraz	5/10
Sheba	5/10
HelloTask	4/10
Chaldal	1/10
Pathao	1/10
Uber	1/10
Delivery Tiger	-
Foodpanda	-
Obhai	-
Paperfly	-
Truck Lagbe	-

India 2023

bigbasket	6/10
BluSmart	5/10
Swiggy	5/10
Urban Company	5/10
Zomato	5/10
Zepto	4/10
Flipkart	3/10
Amazon Flex	2/10
Dunzo	1/10
Uber	1/10
Ola	-
Porter	-

Indonesia 2023

Gojek	2/10
Grab	2/10
Deliveree	1/10
KliknClean	1/10
Lalamove	1/10
Maxim	1/10
Paxel	1/10
Shopeefood	1/10
Borzo	-
inDrive	-

Jordan 2023

Careem	-
Careem Box	-
Jeeny	-
Queen Car	-
Talabat	-
Taxi-F	-
Uber	-
Zad	-

Lebanon 2023

Bolt	–	○○○○○○○○○○
Gozilla	–	○○○○○○○○○○
inDrive	–	○○○○○○○○○○
TaxiF	–	○○○○○○○○○○
Toters	–	○○○○○○○○○○
Uber	–	○○○○○○○○○○

Pakistan 2023

Bykea	-	○○○○○○○○○○
Careem	-	○○○○○○○○○○
Foodpanda	-	○○○○○○○○○○
GharPar	-	○○○○○○○○○○
inDrive	-	○○○○○○○○○○
Uber	-	○○○○○○○○○○

Philippines 2023

GrabCar (4W)	3 /10	●●●○○○○○○○
GrabExpress /Food	2 /10	●●○○○○○○○○
Angkas (2W)	1 /10	●○○○○○○○○○
Lalamove	1 /10	●○○○○○○○○○
Borzo	–	○○○○○○○○○○
Foodpanda	–	○○○○○○○○○○
Joyride (2W)	–	○○○○○○○○○○
Joyride Car	–	○○○○○○○○○○
Maxim	–	○○○○○○○○○○
TokTok	–	○○○○○○○○○○

Vietnam 2023

Baemin	–	○○○○○○○○○○
BeBike (Be)	–	○○○○○○○○○○
BeFood (Be)	–	○○○○○○○○○○
bTaskee	–	○○○○○○○○○○
GoFood (Gojek)	–	○○○○○○○○○○
GoRide (Gojek)	–	○○○○○○○○○○
GrabBike (Grab)	–	○○○○○○○○○○
GrabFood (Grab)	–	○○○○○○○○○•
ShopeeFood	–	○○○○○○○○○○

EUROPE

Albania 2023

Baboon	7 /10	●●●●●●●○○○
Aladini	2 /10	●●○○○○○○○○
SpeedTaxi	2 /10	●●○○○○○○○○
ADEX	-	○○○○○○○○○○
Foodini	-	○○○○○○○○○○

Georgia 2023

Glovo	4 /10	●●●●○○○○○○
Wolt	4 /10	●●●●○○○○○○
Maxim	2 /10	●●○○○○○○○○
Bolt	1 /10	●○○○○○○○○○
Bolt Food	1 /10	●○○○○○○○○○
Yandex	1 /10	●○○○○○○○○○

Bosnia & Herzegovina 2023

Glovo	4 /10	●●●●○○○○○○
Korpa	2 /10	●●○○○○○○○○
Žuti Taxi	2 /10	●●○○○○○○○○
mojTaxi	1 /10	●○○○○○○○○○
StudenTime	1 /10	●○○○○○○○○○
Daibau.ba	-	○○○○○○○○○○
Fix.ba	-	○○○○○○○○○○
Šetnja.ba	-	○○○○○○○○○○

Serbia 2023

Glovo	3 /10	●●●○○○○○○○
Wolt	3 /10	●●●○○○○○○○
Mr D	-	○○○○○○○○○○
Yandex	-	○○○○○○○○○○

UK 2023

Pedal Me	8 /10	
Getir	7 /10	
Stuart	5 /10	
Amazon Flex	3 /10	
Deliveroo	3 /10	
Gorillas	3 /10	
Uber	2 /10	
Just Eat	1 /10	
Bolt	-	
Free Now	-	
Task Rabbit	-	
Uber Eats	-	

MIDDLE EAST & AFRICA

Egypt 2023

Breadfast	6/10
Mrsool	6/10
Orcas	6/10
Filkhedma	5/10
Talabat	4/10
Uber	3/10
Elmenus	1/10
Swvl	1/10
Taskty	1/10
inDrive	-

Kenya 2023

Glovo	3/10
Little Ride	3/10
Yego	3/10
Little Delivery	2/10
Bolt	1/10
Bolt Food	-
Faras	-
InDrive	-
Jumia Food	-
Uber	-
Uber Eats	-
Wasili	-

Morocco 2023

Glovo	2/10
Kaalix	2/10
Careem	-
inDrive	-
Jumia Food	-

Nigeria 2023

Glovo	4/10
Mano	1/10
Bolt	-
Bolt Food	-
ChowDeck	-
GoKada	-
inDrive	-
Jumia Food	-
Kwik	-
Lagos Ride	-
Rida	-
Uber	-

South Africa 2023

Mr D Food	6 /10	●●●●●●○○○○
SweepSouth	6 /10	●●●●●●○○○○
Home+	4 /10	●●●●○○○○○○
Uber	-	○○○○○○○○○○
Uber Eats	-	○○○○○○○○○○

Tanzania 2023

Paisha	2 /10	●●○○○○○○○○
Zanzicab	2 /10	●●○○○○○○○○
Bolt	-	○○○○○○○○○○
Chapride	-	○○○○○○○○○○
Faras	-	○○○○○○○○○○
Fixchap	-	○○○○○○○○○○
indrive	-	○○○○○○○○○○
LittleRide	-	○○○○○○○○○○
Moovn	-	○○○○○○○○○○
Piki	-	○○○○○○○○○○
Ping	-	○○○○○○○○○○
Rida	-	○○○○○○○○○○
Uber	-	○○○○○○○○○○

Uganda 2023

Glovo	2 /10	●●○○○○○○○○
Bolt	-	○○○○○○○○○○
DeliveryYo	-	○○○○○○○○○○
Easy Matatu	-	○○○○○○○○○○
Jumia	-	○○○○○○○○○○
Little	-	○○○○○○○○○○
Lolo	-	○○○○○○○○○○
Quicksend	-	○○○○○○○○○○
Safeboda	-	○○○○○○○○○○
SPESHO	-	○○○○○○○○○○
Tuko Food Delivery	-	○○○○○○○○○○
Uber	-	○○○○○○○○○○

APPENDIX III

Pro-worker Changes

Platforms have the ability to improve conditions for their workers, while continuing to provide income opportunities. In consultation with the Fairwork team, the following platforms agreed to implement changes to their policies or practices.

Country	Principle	Platform	Commitment/action
Albania	4.1	Baboon	Baboon has established channels of communication between management, dispatchers and workers
Brazil	1.1	AppJusto	AppJusto published a page detailing data on remuneration, involving minimum wage, ideal minimum wage, and costs for workers. The platform also launched a cost and earnings calculator for workers.
Brazil	2.1	AppJusto	AppJusto introduced IZA insurance in April 2023 for all workers in all their deliveries.
Brazil	2.1	iFood	iFood is testing a pilot project – called "score" – so that workers who stop working for a certain period do not have their position on the platform affected.
Brazil	2.1	Parafuzo	Parafuzo has provided access to SURA personal accident insurance free of charge since July 1, 2023.
Brazil	3.1	AppJusto	AppJusto has documented all changes to the contract in a repository on GitHub so that everyone has access to all versions of the terms.
Brazil	3.1	iFood	iFood updated its terms and conditions on July 7, 2023. Among the changes, it included a 30 day notice period before changes in contracts to take effect, simplified the law and jurisdiction clause to provide that the terms are governed and interpreted in accordance with Brazilian laws – without choosing a specific city.
Brazil	3.2	iFood	Terms and conditions updated to include a 30 day notice period before changes in contracts to take effect.
Brazil	3.2	iFood	Contract updated to include a clause that the worker is only liable in case of misuse of the platform.
Brazil	4.1	AppJusto	AppJusto amended the contracts on July 5, 2023 to document how the deactivations work on the platform, also explaining that there are no automatic blocks. The platform has also included an anti-discrimination clause in its contracts.
Brazil	4.2	AppJusto	AppJusto has also included a complaint form within the app so that workers can report any types of discrimination. The platform also committed to sharing the source code with researchers who are interested in doing an independent algorithmic audit of AppJusto.

Country	Principle	Platform	Commitment/action
Brazil	4.2	iFood	iFood has a new anti-discrimination policy under development, which will be published soon.
Brazil	4.2	iFood	The platform launched a Psychological and Legal Support Center, which workers who have been victims of discrimination can access for free.
Brazil	4.1	Parafuzo	Parafuzo created a communication channel through which professionals can dispute absences, fines and evaluations, using the email responsabilidade@parafuzo.com, and through which they will receive a response from the company within two business days. This communication channel was included in the Information Table attached to the platform's Terms of Use and disclosed to workers.
Cloudwork	1.2	ComeUp	ComeUp implemented a minimum wage policy in its terms of service, introducing a guideline where the service prices must be above the minimum wage where the worker resides. The policy was added to the company's FAQ and to its training materials.
Cloudwork	1.2	Terawork	Terawork implemented a minimum wage policy. The company introduced a guideline according to which payments must be equal or higher than the "minimum hourly, daily, weekly or monthly rate after deductions of relevant expenses incurred while delivering their jobs".
Cloudwork	2.1	Appen	Appen reported improvements to manage job availability, including a revamped job board and features to limit the number of applicants when project rosters are filling up.
Cloudwork	2.1	Appen	Appen Workers now have information on how they can access new projects if they update their profiles.
Cloudwork	2.1	Appen	Appen has launched a mechanism that limits the number of tasks for workers.
Cloudwork	2.2	ComeUp	Comeup has amended its terms of use with clauses prohibiting abusive behaviour. Practices such as "sending threatening, insulting, or discriminatory messages to sellers" are now subject to penalties such as account deletion or members' IP address ban.
Cloudwork	3.1	ComeUp	ComeUp has edited its terms, adding a 30-day previous notice to contract changes, in line with the threshold. The changes will be informed by multiple channels used by managers to communicate with workers.
Cloudwork	3.1	Terawork	Terawork amended its terms of service to insert the provision of a 30-day notice before a contract change comes into effect.

Country	Principle	Platform	Commitment/action
Cloudwork	3.2	Soy Freelancer	Soy Freelancer implemented project cancellation rules adding rights and guarantees to workers when they cancel their participation in a job for certain motives and in specific situations (such as bad working conditions, problems in communication with the client, tasks not agreed upon initially, or compelling circumstances).
Cloudwork	3.2	Terawork	Terawork updated the FAQ section with a guideline to encourage clients to inform workers how their work will be used.
Cloudwork	4.1	Appen	Appen reported the introduction of new clauses in its policies, to make the appeal process less arduous. Workers will be able to join arbitration in the country closest to the worker and in other places if mutually agreed, and the company will pay initial costs (up to $500 USD) for this procedure.
Cloudwork	4.1	Soy Freelancer	Soy Freelancer documented the appeal process in its general terms and conditions, explaining how workers can appeal different situations related to pay or other problems in the platform. An email channel is provided for workers to submit their claims.
Cloudwork	4.1	Terawork	Terawork updated its terms of service, to avoid summary sanctions at its own discretion and added new procedures with an explanation of when disciplinary actions are taken and a period for workers to adjust or correct the content published or action taken to comply with the policies and avoid the penalty.
Cloudwork	4.2	ComeUp	ComeUp added an anti-discrimination policy making it explicitly forbidden this kind of behaviour on the basis of gender, race, religion, sexual orientation, or other basis.
Cloudwork	4.2	Terawork	Terawork also updated its FAQ specifying the methods to allocate work.
Cloudwork	4.2	Terawork	Terawork has amended its terms of service with an anti-discrimination policy.
Cloudwork	5.1	Appen	Appen informed a change in its terms to narrow rules on indemnification in a way that they do not restrict workers' rights to present claims that could conbox a barrier to present demands to the platform.
Colombia	4.2	Aux	Aux has developed inclusion and antidiscrimination policies. The policies have been presented and discussed with workers and they have become part of the operations and procedures of the platforms.
Colombia	4.2	Cabify	Cabify has developed inclusion and antidiscrimination policies. The policies have been presented and discussed with workers and they have become part of the operations and procedures of the platforms.
Colombia	4.2	Hogarú	Hogarú has developed inclusion and antidiscrimination policies. The policies have been presented and discussed with workers and they have become part of the operations and procedures of the platforms.
Ecuador	1.1	Asoclim	Asoclim now ensures workers earn at least the local minimum wage after costs by upgrading service's costs

Country	Principle	Platform	Commitment/action
Ecuador	2.1	Asoclim	Asoclim now mitigates task-specific risks by volunteer afiliation in National Social Security System
Egypt	2.1	Breadfast	Breadfast added to its starter kits additional information on “the Last Mile team” and ways for workers to reach out to this group. The Last Mile team can provide support to workers who seek help with issues related to safety.
Egypt	2.1	Orcas	Orcas added a new feature to its applications for tutors to express problems with clients. The platform will now be mitigating the risks of lone working by providing adequate support.
Egypt	3.1	Breadfast	Breadfast has added a data protection policy in its hiring link.
Egypt	3.1	Mrsool	Mrsool updated the company’s governing law to Egyptian law in their terms and conditions and will be sharing the news with their workers in early 2023.
Egypt	3.1	Orcas	Orcas reworded a statement regarding the use of personal data to make it more worker-friendly.
Egypt	4.2	Breadfast	Breadfast added an anti-discrimination policy in its hiring link.
Egypt	4.2	Filkhedma	Filkhedma added in its recruitment posts an explicit welcome and call for people with disabilities.
Egypt	4.2	Mrsool	Mrsool added an anti-discrimination policy to its updated terms and conditions.
Egypt	5.1	Orcas	Orcas added one of the tutors on the platform as a moderator on the Facebook group. It announced this new development to all its tutors and ensured that they can reach out without any fear of repercussion while retaining their anonymity.
Egypt	5.1	Orcas	Orcas issued a statement on its willingness to recognize a trade union and engage in collective bargaining. The statement can be found on their website and tutor’s kit.
Georgia	4.2	Wolt	Wolt has compiled a list of toilets for their workers as part of their efforts to provide support to their workers, and to make sure women couriers are not being discriminated against and have access to hygienic conditions.
India	1.1	bigBasket	BigBasket has redesigned its app interface to enhance transparency in the payment structure and provide workers with visibility into their earnings, including flagging the minimum payout and reimbursements workers will receive in light of their minimum wage policy.
India	1.1	Urban Company	Urban Company has agreed to launch monthly earnings guarantee for qualified partners starting Oct 1, 2023, initially in Salon and Cleaning categories.
India	1.1	Urban Company	Urban Company have agreed to implement an external auditor to review payments.

Country	Principle	Platform	Commitment/action
India	1.1	Urban Company	Urban Company implement an awareness campaign for their minimum wage policy through their app, onboarding training, and focus groups.
India	1.2	Urban Company	Urban Company committed to paying a living wage for all workers.
India	2.1	bigBasket	Big Basket have instituted formal loss of standing policy so that workers are not penalised for taking periods of leave.
India	2.1	Urban Company	Urban Company has comitted to expanding the safety equipment provided to workers at no additional costs.
India	2.1	Zepto	Zepto has instituted a formal loss of standing policy so that workers are not penalised for taking periods of leave.
India	3.1	Blusmart	Blusmart has made all the changes to worker T&Cs as recommended by the Fairwork team, effective August 14th, 2023 including -- Data privacy policy updated to include details of data collected, purpose and the platform's commitment to protect data.
India	3.1	Blusmart	Blusmart has made their contracts available in regional languages so that workers can meaningfuly engage with their contractual conditions in a language they are comforatble with.
India	3.1	Dunzo	Dunzo has committed to making contracts available in regional languages.
India	3.1	Swiggy	Swiggy have introduced a data privacy policy contains details of data collected, its purpose and the platform's commitment to protect this data.
India	3.1	Zomato	Zomato has defined the scope of Delivery Partner Information and updated their Terms and Conditions to now include 'photographs' as part of the provided information.
India	3.2	bigBasket	bigBasket have added provisions to their agreements with subcontractors, requiring that workers under subcontractors receive at least the same work conditions as those onboarded directly by the platform.
India	3.2	BluSmart	BluSmart have introduced a financial cap on the liabilities of workers.
India	3.2	Swiggy	Swiggy has commited to incorporating the necessary clauses related to working conditions, including a Service Provider Code of Conduct and provisions for audits and assessments, in the subcontractor agreement.
India	3.2	Urban Company	Urban Company has agreed to provide a prior notification period of 30 days before implementing any changes and has agreed to compensate workers for the consumables in stock at that time. They have also modified clause 18(b), effective 30th September 2023.
India	3.2	Urban Company	Urban Company has agreed to modify clause 3(d)(iv) to state that in cases where a worker is unable to fulfil requests due to UC's fault, a penalty shall not be levied on workers, effective 30th September 2023.

Country	Principle	Platform	Commitment/action
India	3.2	Zepto	Zepto has added provisions in their agreements with subcontractors, requiring that workers under subcontractors receive at least the same work conditions as those onboarded directly by the platform.
India	4.1	Blusmart	Blusmart have given workers the ability to appeal penalties for delays in returning leased vechicles.
India	4.1	Zomato	Zomato has agreed to include a clause in the T&Cs stating that workers will not face penalties for voicing their concerns to the team.
India	4.2	Blusmart	Blusmart has committed to introducing a comprehensive anti discriminatory policy covering equality, anti discrimination and inclusion.
India	4.2	Blusmart	Blusmart has conducted its first external audit of work allocation processes.
India	4.2	Swiggy	Swiggy has conducted its first external audit of work allocation processes.
Kenya	3.1	Little Delivery	Little Delivery has included the standard contract between the platform and its drivers on the website to improve accessibility.
Kenya	3.1	Little Ride	Little Ride has included the standard contract between the platform and its drivers on the website to improve accessibility.
Kenya	4.1	Little Delivery	Little Delivery has included a clear statement for workers to appeal any disciplinary decision
Kenya	4.1	Little Ride	Little Ride has included a clear statement for workers to appeal any disciplinary decision.
Kenya	4.2	Little Delivery	Little Delivery has added an antidiscrimination policy to their terms and conditions which is also on their website. The platform has further committed to investigating and dismantling barriers to equal participation for underrepresented or disadvantaged groups, including women.
Kenya	4.2	Little Ride	Little Ride has added an antidiscrimination policy to their terms and conditions which is also on their website. The platform has further committed to investigating and dismantling barriers to equal participation for underrepresented or disadvantaged groups such as women.

Country	Principle	Platform	Commitment/action
Kenya	4.2	Glovo	As part of their Couriers' Pledge initiative, Glovo has improved its anti-discrimination policy where platform workers should not be discriminated against based on race, gender, religion, disability, age, ethnicity, national origin, ancestry, sexual orientation and/or opinion. The policy also includes an anti-sexual harassment statement.
Kenya	4.2	Glovo	As part of the Pledge initiative, Glovo has started an initiative called 'Project Dada' for women, with a clear aim of dismantling barriers to equal participation for underrepresented or disadvantaged groups. This initiative grants extra safety to women through the help of an SOS button due to the level of violence and harassment experienced.
Morocco	3.1	Glovo	Glovo agreed to translate its general terms and conditions into Moroccan Arabic.
T&T	1.1	Creative Words	Creative Words reduced the payment window from 60 to 45 days.
T&T	1.1	Creative Words	Creative Words added a line to the service level agreement (SLA) describing their policy for non payment.
T&T	1.1	Creative Words	Creative Words added a paragraph in the onboarding kit specifying how the rate negotiation process works.
T&T	2.1	Creative Words	Creative Words have added a paragraph on the SLA specifying work allocation criteria.
T&T	2.2	Creative Words	Creative Words have added a line in the onboarding kit stating they will flag any content in violation of the Code of Conduct.
T&T	3.1	Creative Words	Creative Words have added a line on the SLA establishing a 4 week notification period for any contract changes.
T&T	3.2	Creative Words	Creative Words have removed non-compete clause and changed it to a project-based obligation to involve the platform in communication with client.
T&T	4.1	Creative Words	Creative Words have added line to the SLA describing the policy for de-activation.
T&T	4.1	Creative Words	Creative Words have added line to the SLA outlining how the appeals process works if a collaborator wants to issue a complain about revisions, what are the steps and the guidelines for project management.
T&T	4.1	Creative Words	Creative Words have added a line to the onboarding kit clarifying that the appeals process is available off-platform.
T&T	4.2	Creative Words	Creative Words have added line to onboarding kit stating workers will be consulted before any change to work allocation methods.
T&T	4.2	Creative Words	Creative Words have removed any reference to law from Code of Conduct when referencing what discrimination is not accepted (previous phrasing implied only illegal discrimination was forbidden).

Country	Principle	Platform	Commitment/action
T&T	5.1	Creative Words	Creative Words have added line in the Code of Conduct clarifying that the International Chamber of Commerce arbitration process outlined in the SLA is not substitutive of collective bargaining.
T&T	5.2	Creative Words	Creative Words have added line to Code of conduct stating openness to recognise a workers body and engage in collective bargaining.
Tanzania	3.1	Paisha	Paisha have included a privacy/data protection policy in their app, as well as online. These are also now in both in Swahili and English on the website.
Tanzania	4.1	Paisha	Paisha have included an appeals statement in the Ts & Cs that enables drivers to appeal disciplinary decisions or any complaints affecting their work. This is available on their website.
Tanzania	4.2	Paisha	Paisha have included an anti-discrimination policy in their website.
Tanzania	General	Paisha	Paisha have created a separate website for from their major partner Vodacom for improved legibility with T&C, data protection, and anti-discrimination policies.
UK	2.1	Stuart	Stuart have announced that they will replace kit damaged during accidents free of charge, and have introduced a system whereby couriers can replenish their kit free of charge if it is faulty, damaged, or worn-out within a year
UK	2.2	Stuart	Stuart have greatly strengthened the insurance offering they make to riders – while still using self-employment contracts – to include a broad spectrum of support including access to an online GP, physiotherapy, and mental health support, in addition to sickness pay.
UK	3.1	Stuart	Stuart provides lay English summaries of contractual changes ahead of time to ensure riders are able to understand them.
UK	4.1	Getir	Getir have made changes to disciplinary policy to make it clearer to workers that they are able to engage in a disciplinary appeals process. They have removed exemption clauses from their disciplinary process documentation
UK	4.1	Stuart	Stuart have implemented a new feature for rider support that has brought the median response completion time down by two thirds.
UK	5.1	Pedal Me	The Principle of the voluntary recognition has been accepted and PedalMe are now negotiating its details.
US	3.1	Papa Pals	Papa has committed to translating the platform's Terms and Conditions, Privacy Policy, and End User Agreement into Spanish by the end of the year.
US	3.2	Papa Pals	Papa has committed to changing the language in their terms of service to specify that they will give workers a reasonable period of notice before making changes to their terms of service.
US	5.1	Papa Pals	Papa has agreed to update their Code of Conduct to include language that outlines a non-retaliation policy in the event that workers decide to self-organize and to share this policy with workers by the end of the year.

APPENDIX IV

Fairwork Principles Illustrations

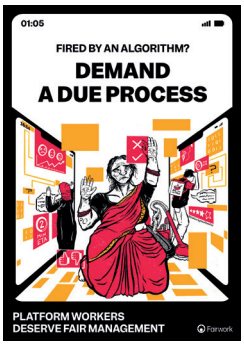
Colombia

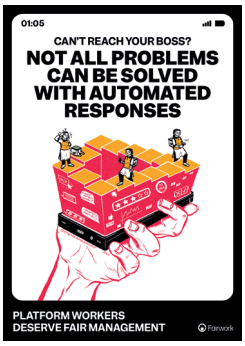
Egypt

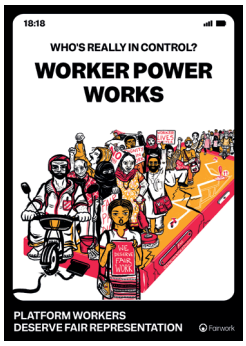
Ghana

Global

India

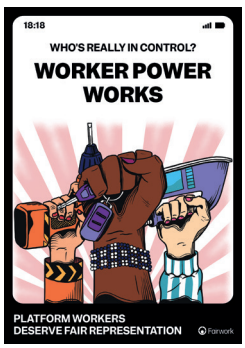






Indonesia

South Africa



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Credits and funding

Fairwork is a project coordinated by the Oxford Internet Institute, University of Oxford and the WZB Berlin Social Science Center, and draws on the expertise and experience of staff at Access to Knowledge for Development Center (A2K4D) at the American University in Cairo's School of Business, Audencia Business School, Center for Development Evaluation and Social Science Research (CREDI), Center for Health Consultation and Community Development (CHD), Centre for Labour Research, CIPG Innovation Policy Governance, CREDI, De La Salle University, FLACSO-Ecuador, Institute for a Fair Economy, International Institute of Information Technology Bangalore (IIITB), International University of Rabat, iSocial, KU Leuven, Lagos Business School, Luigj Gurakuqi University of Shkodër, Observatorio de Plataformas Perú, Phenix Center for Economics & Informatics Studies, Pollicy, Public Policy Research Center (CENTAR), Qhala, REPOA, Sapienza University of Rome, TEDIC, The Policy Initiative, TU Wien, Universidad Adolfo Ibáñez, Universidad Católica del Uruguay, Universidad Complutense de Madrid, Universidad del Rosario, University of California College of the Law, San Francisco, University of Manchester, and University of São Paulo.

Authors:

Adam Badger, Anjali Krishan and Mark Graham.

Fairwork Team:

Jana Ababneh, Eisha Afifi, Wirawan Agahari, Pablo Aguera Reneses, Iftikhar Ahmad, Tariq Ahmed, Shamarukh Alam, María Belen Albornoz, Luis Pablo Alonzo, Oğuz Alyanak, Hayford Amegbe, Branka Andjelkovic, Marcos Aragão, María Arnal, Arturo Arriagada, Daniel Arubayi, Sami Atallah, Tat Chor Au-Yeung, Ahmad Awad, Razan Ayesha, Adam Badger, Meghashree Balaraj, Joshua Baru, Ladin Bayurgil, Ariane Berthoin Antal, Alessio Bertolini, Wasel Bin Shadat, Virgel Binghay, Ameline Bordas, Maren Borkert, Álvaro Briales, Lola Brittain, Joe Buckley, Callum Cant, Rodrigo Carelli, Eiser Carnero Apaza, Eduardo Carrillo, Maria Catherine, Chris King Chi Chan, Henry Chavez, Ana Chkareuli, Andrea Ciarini, Antonio Corasaniti, Pamela Custodio, Adriansyah Dhani Darmawan, Olayinka David-West, Luisa De Vita, Alejandra S. Y. Dinegro Martínez, Brikena Kapisyzi Dionizi, Ha Do, Matías Dodel, Marta D'Onofrio, Elvisa Drishti, Veena Dubal, James Dunn-Willimason, Khatia Dzamukashvili, Pablo Egaña, Dana Elbashbishy, Batoul ElMehdar, Elisa Errico, Úrsula Espinoza Rodríguez, Patrick Feuerstein, Roseli Figaro, Milena Franke, Sandra Fredman, Farah Galal, Jackeline Gameleira, Pía Garavaglia, Chana Garcia, Michelle Gardner, Navneet Gidda, Shikoh Gitau, Slobodan Golusin, Eloísa González, Mark Graham, Rafael Grohmann, Martin Gruber-Risak, Francisca Gutiérrez Crocco, Seemab Haider, Khadiga Hassan, Richard Heeks, Sopo Japaridze, Mabel Rocío Hernández Díaz, Luis Jorge Hernández Flores, Victor Manuel Hernandez Lopez, Nur Huda, Huynh Thi Ngoc Tuyet, Francisco Ibáñez, Neema Iyer, Tanja Jakobi, Athar Jameel, Abdul Bashiru Jibril, Ermira Hoxha Kalaj, Raktima Kalita, Revaz Karanadze, Zeynep Karlidağ, Lucas Katera, Bresena Dema Kopliku, Maja Kovac, Zuzanna Kowalik, Anjali Krishan, Martin Krzywdzinski, Amela Kurta, Ilma Kurtović, Morad Kutkut, Tobias Kuttler, Arturo Lahera-Sánchez, Jorge Leyton, Annika Lin, Georgina Lubke, Bilahari M, Raiyaan Mahbub, Wassim Maktabi, Oscar Javier Maldonado, Laura Clemencia Mantilla León, Claudia Marà, Ana Flavia Marques, Margreta Medina, Rusudan Moseshvili, Jamal Msami, Karol Muszyński, Hilda Mwakatumbula, Beka Natsvlishvili, Mounika Neerukonda, Ana Negro, Chau Nguyen Thi Minh, Sidra Nizambuddin, Claudia Nociolini Rebechi, Bonnita Nyamwire, Mitchelle Ogolla, Oluwatobi A. Ogunmokun, Frederick Pobee, Daviti Omsarashvili, Caroline A Omware, Nermin Oruc, Christian Nedu Osakwe, Balaji Parthasarathy, Francesca Pasqualone, María Inés Martínez Penadés, Leonhard Plank, Frederick Pobee, Valeria Pulignano, Jack Linchuan Qiu, Jayvy R. Gamboa, Ananya Raihan, Antonio Ramírez, Juan-Carlos Revilla, Ambreen Riaz, Alberto Riesco-Sanz, Nagla Rizk, Moisés K. Rojas Ramos, Federico Rosenbaum Carli, Cheryll Ruth Soriano, Julice Salvagni, Derly Yohanna Sánchez Vargas, Maricarmen Sequera, Murali Shanmugavelan, Aditya Singh, Shanza Sohail, Janaki

Srinivasan, Anna Sting, Isabella Stratta, Zuly Bibiana Suárez Morales, David Sutcliffe, Mubassira Tabassum Hossain, Tasmeena Tahir, Ainan Tajrian, Dinh Thi Chien, Kiko Tovar, Funda Ustek Spilda, Jonas Valente, Giulia Varaschin, Daniel Vizuete, Annmercy Wairimu, Jing Wang, Robbie Warin, Nadine Weheba, Katie J. Wells, Anna Yuan and Sami Zoughaib.

Editors:

David Sutcliffe

Please cite as:

Fairwork (2024) Fairwork Annual Report 2023: State of the Global Platform Economy. Oxford, United Kingdom; Berlin, Germany.

Please note that this report contains sections in common with other Fairwork reports, notably the Fairwork Framework, parts of the Impact and Next Steps section and the Appendix.

Report Design:

One Ltd.

Communications and typesetting:

Navneet Gidda, Pablo Aguera Reneses, Creative Mouse.

Funders:

This publication arises from research funded by the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ), commissioned by the German Federal Ministry for Economic Cooperation and Development (BMZ).

Special thanks to:

Joanna Barlow, Maisy Gills, Caroline Hampshire, Lucy Hennings, Philip Hind, Mark Malbas, Victoria Nash, Katia Padvalkava, Roz Pacey, Duncan Passey, Sara Spinks and David Sutcliffe at the University of Oxford for their extensive administrative support for the project since its inception. The project team is deeply grateful to Shakhlo Kakharova, Kirsten Schuettler and Lukas Sonnenberg at GIZ for their continuing support and guidance as we take our work to the next stage. Finally, we would like to acknowledge a large number of workers and platform managers around the world for taking the time to help us build our ratings. All of the work in this project was shared not just amongst our research team, but also amongst the stakeholders who our ratings ultimately affect.

Conflict of interest statement:

None of the researchers have any connection with any of the platforms and the work undertaken received no funding or support in kind from any platform or any other company, and we declare that there is no conflict of interest.

A COLLABORATION BETWEEN

OXFORD INTERNET INSTITUTE

UNIVERSITY OF OXFORD

WZB Wissenschaftszentrum Berlin für Sozialforschung

FUNDED BY

Bundesministerium für wirtschaftliche Zusammenarbeit und Entwicklung

giz Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH

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Find out more

fair.work

info@fair.work

@TowardsFairWork

@TowardsFairWork