



International Alliance of  
App-based Transport Workers

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# SOUTHEAST ASIA SHADOW REPORT ON PLATFORM WORK STANDARDS

Based on an inter-organisational consultative dialogue among Southeast Asian worker organisations



***Shadow Report on Platform Work  
Standards in Southeast Asia***

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## EXECUTIVE SUMMARY

Across Southeast Asia, platform workers are caught in a new form of digital exploitation—coerced not by physical force, but by algorithms and gamified manipulation. From Jakarta to Phnom Penh, platform drivers are nudged to keep working longer hours through point systems, badges, and “performance rewards” that rarely translate into fair pay. Far from being a motivational tool, this gamification model has become a form of digital forced labour, pushing workers into exhaustion, instability, and constant surveillance.

This shadow report, released alongside the 113th International Labour Conference in 2025, sharply focuses on the urgent need to implement decent work standards for platform workers in Indonesia and Cambodia. While digital platforms present themselves as engines of innovation and opportunity, the reality for workers is far more dire: low and unpredictable earnings, dangerous working conditions, and no access to basic labour rights or protections.

Southeast Asia is experiencing rapid digitalisation. By 2024, the region’s ride-hailing market alone is projected to reach USD 3.04 billion, with a compound annual growth rate (CAGR) of 12% (Bali, 2025). A young, urbanised population and high smartphone penetration propel this growth. Yet the economic benefits have largely bypassed the workers. In ASEAN, 244 million workers—or 78% of the total employed population—are still in informal employment (ASEAN, 2022; ILO, n.d.). For many gig workers, platform labour has simply become the digital face of informality.

Drawing from a multi-method approach—literature reviews, surveys, and 40+ in-depth interviews with platform workers and organisers—this report identifies three key challenges undermining workers’ rights:

1. **Algorithmic Coercion and Opacity:** Workers are governed by opaque algorithmic systems that determine who gets jobs, when, and how much they earn, without transparency, due process, or recourse.
2. **Lack of Social Protection and Safety Nets:** Despite their essential roles, platform workers lack protections such as healthcare, accident insurance, sick leave, or retirement benefits. In Indonesia, 70% of online drivers surveyed report having no access to formal social security (Pradana & Yuana, 2022).
3. **Regulatory and Institutional Voids:** Governments in Cambodia and Indonesia have failed to keep pace with platform growth. Labour laws remain outdated or unenforced, creating a policy vacuum exploited by companies.

These dynamics collectively generate structural conditions of precarity and super-exploitation. In Cambodia, interviews with tuk-tuk drivers revealed consistent themes: fear of deactivation, pressure to work even when ill, and confusion over how the app evaluates them. In Indonesia, drivers report a “bonus trap”—where incentive structures force them to stay online for 12–14 hours per day, often earning below local minimum wage after expenses (ILO, 2021; ITF, 2022). While presented as innovation, gamification is functioning as a mechanism of soft coercion, encouraging continuous labour with minimal protections. When workers are nudged to compete for limited jobs, to accept all orders, and to work longer hours to “level up,” it creates a behavioural feedback loop that strips them of autonomy and wellbeing. This directly violates ILO Conventions on decent work, freedom of association, and protection from forced labour (ILO C87, C98, C29).

To move toward justice in the platform economy, several urgent actions are needed. Governments must take the lead by adopting and enforcing comprehensive legal frameworks that recognise the rights of gig workers. This includes formally acknowledging employment relationships, mandating social protections, and closing the regulatory gaps that platform companies currently exploit. Such regulation must be coherently established across national and local levels to prevent jurisdictional overlap and ensure effective implementation. Platform companies must also be held accountable. They must implement transparent algorithmic systems, ensure fair and living wages, provide effective grievance mechanisms, and create space for workers to have a voice in how platforms are governed. At the global level, international organisations must push for binding standards that protect platform workers, building upon existing ILO efforts, including the 2021 report “*Making Decent Work a Reality for Platform Workers*.” These standards must not remain aspirational; they must be translated into enforceable rights that cross borders, just like the platforms themselves. Most importantly, worker solidarity must grow. Across Southeast Asia, grassroots organising efforts and cross-border networks are already emerging, led by workers who are refusing to remain invisible. These movements must be supported, amplified, and connected.

This report is not just a documentation of injustice but a call to action. The future of work is being built now. We must choose whether it will be one of freedom or control, fairness or exploitation, dignity or disposability. Platform workers in Southeast Asia deserve better. Decent work must become the baseline, not the exception.

## INTRODUCTION AND REPORT DESIGN

### Background

Although technology has advanced rapidly and transformed people's lives, its adverse impacts continue, mainly because inclusive approaches are often neglected. A clear example is the rise of platform-based work, such as ride-hailing, which shows how technological development reshapes urban transportation systems. Because of their efficiency, more people are shifting away from traditional commuting methods, like station-based motorcycle taxis, and turning to platform services.

Platform companies such as Grab and Gojek dominate Southeast Asia. As of 2020, Grab had 183 million users and 2.8 million drivers, while Gojek had 170 million users and 2 million drivers (Consumer News & Business Channel, 2020; Bangkok Post, 2020). The reach of platform-based work grows even further when including services like Maxim, inDrive, Lalamove, and My Blue Bird—commonly used in Indonesia—as well as PassApp, Wego, TADA, Eagle, E-GetS, and WOWNOW in Cambodia. Compared to many Western countries, platform-based work in Southeast Asia is even more widespread, driven by a range of factors.

**First**, rising pressure on public transportation systems and rising income have led to rapid motorisation, making vehicles increasingly attractive to the expanding middle class (Charlempong et al., 2023; Muchlisin et al., 2024). **Second**, motorcycles dominate the motor vehicle market in Southeast Asia, especially in countries like Vietnam, Indonesia, and the Philippines, as well as automotive hubs such as Malaysia and Thailand (Charlempong et al., 2022; Tomiyama & Goh, 2024). This trend has further accelerated the rise of ride-hailing services. **Third**, formal public transport has struggled to keep pace with urban sprawl, leaving many Southeast Asians dependent on informal transport options (Charlempong et al., 2016). Yet, despite these services' convenience and employment opportunities, structural challenges remain, particularly in ensuring decent working conditions for those involved.

Positioning the principle of decent work standards as outlined by the ILO, it is undeniable that the platform work scheme in Southeast Asia has faced structural issues. According to the ILO's Manual on Decent Work Standards (2013), four strategic pillars are introduced to establish the scope of decent work standards: (i) international labour standards and fundamental principles and rights at work; (ii) employment creation; (iii) social protection; and (iv) social dialogue and tripartism. However, these pillars are minimally represented in

platform working conditions in Southeast Asia, highlighting the urgency to consider the broader implications for platform workers.

Ironically, the reality faced by platform workers in this region is that the work available is irregular, and earnings are often offset by the time workers spend searching for jobs and travelling between locations. Additionally, platforms fail to provide consistent work for their workers daily. Moreover, platform companies often impose high commission rates, which can misrepresent the true nature of the work. Since platforms set the work conditions and wages, control the interface between employers and workers, and collect data from both parties, they also retain a large portion of the payment from customers, leaving workers with little opportunity to negotiate (Widianto & Purnomo, 2024; Tandon & Rath, 2021). This practice bypasses Article 15 of the ILO Convention on Domestic Workers, 2011 (No. 189), which prohibits placement agencies from charging workers fees or taking a portion of their earnings as commission (Tandon & Rath, 2021).

In countries like Indonesia and Cambodia, these issues are particularly significant. Both nations struggle to ensure the sustainability of platform-based labour, hindered by exploitative work mechanisms and a lack of adequate regulatory oversight. Common structural challenges include minimal legal protection, unfair competition, income instability, discrimination, inadequate worker welfare and rights, and pressure imposed by the platforms. These problems are algorithmic pressure. As such, it is essential to provide a comprehensive picture of the unhealthy nature of the platform work, highlighting the need for advocacy at the international level, as governments do not adequately address the issues at the national level.

This shadow report centres its analysis on three key areas. **First** is the impact of algorithmic control exercised by platform companies on workers' well-being, focusing on the consequences for their livelihoods and working conditions. **Second**, platform companies' implementation of social protection and justice measures is assessed to determine how well these reflect a genuine commitment to the principles of decent work. **Finally**, the role of government in regulating platform work, with a particular emphasis on fare-setting, fair competition, and providing social and health protection.

Ultimately, this shadow report is produced to contribute to the global conversation about Southeast Asian platform work conditions, accentuating grassroots voices and perspectives. Furthermore, it promotes the transformation of platform work, oriented towards balanced advantages for both workers and platform companies.



## **Objectives**

In response to those structural problems of platform work in Southeast Asia, three objectives are outlined in this report:

1. Empower the voices and perspectives of platform workers in the International landscape.
2. Expose the unhealthy nature of platform work in Southeast Asia, particularly in Indonesia and Cambodia, and encourage necessary action to address it.
3. Leverage international attention to encourage national governments to take responsibility for addressing the challenges faced by platform workers.

## **Methodology**

This report draws upon a literature review, survey, and interviews to comprehensively understand platform work in Southeast Asia, with particular emphasis on Indonesia and Cambodia. These two countries were selected primarily due to their affiliation with the International Alliance of App-Based Transport Workers (IAATW) and the constraints of the limited timeframe available for intense engagement. Additionally, both contexts demonstrate the emergence of bottom-up worker movements that challenge the dominant platform work ecosystem. Despite minimal responsiveness from government authorities and platform companies, the resilience of these movements remains unwavering. While the scope of this report is currently limited, future research will seek to incorporate additional countries in the region to more fully capture the diversity of voices and perspectives.

Literature review, survey, and interview were triangulated to strengthen the findings' validity and explore structural dimensions of platform work. All data collection processes were consent-based, with participants asked for explicit consent to utilise their responses for research and reporting purposes.

The literature review was used to identify and contextualise existing issues in the platform work, particularly those affecting workers. It outlines common challenges such as limited legal protection, inadequate regulatory frameworks, minimal social and justice measures, and exploitative work practices.

The survey was conducted with participants in Indonesia. Rather than relying on short or closed responses, the survey invited participants to provide detailed answers based on their experiences. This allowed for a deeper exploration of workers' realities and enabled the report to reflect the specific contexts and concerns raised by platform workers.



The interview was conducted in Cambodia, where time constraints prevented using a survey. However, the same questions developed for the Indonesian survey were adapted into an interview format. A respectful and nonjudgmental space was created to ensure the participant felt safe and supported during the discussion. This included providing open-ended questions, encouraging the participant to share the stories freely, and ensuring all voices were heard without interruption. Such an approach allowed the participant to speak honestly about their experiences and concerns regarding the platform work.

Below is the question clustering for the survey and interview data collection process.

**Table 1.** Question Clustering

Cluster	Focus
<b><i>Algorithmic Management</i></b>	Impact of algorithms on income fluctuations and fairness of treatment.
<b><i>Social and Justice Measures</i></b>	Fairness in the working environment, gender discrimination, and platform responses to challenges.
<b><i>Government Regulations</i></b>	The impact of minimum and maximum fare regulations, income stability, and government protections.
<b><i>Advocacy and Institutional Response</i></b>	Experiences with advocacy efforts and government/platform responses.
<b><i>Solutions and Additional Issues</i></b>	Suggestions for improvements and identification of other important issues.

## Participants' profile

### Indonesia

In Indonesia, 35 participants participated in the preliminary survey, comprising **30 males and 5 females**. Regarding age distribution, 9 participants were between 30 and 39 years old, another 15 were in the 40–45 age range, and 11 were aged 46–52. Participants reported affiliations with various work platforms, including Gojek, Grab, Maxim, Shopee, Lalamove, and InDrive.

### Cambodia

In Cambodia, one representative from the Independent Democracy of Informal Economy Association (IDEA) participated in the interview. Data collection was carried out mainly through this discussion, with secondary data collection utilised to enrich the information.

## CONTEXTUAL ANALYSIS

As previously stated in the introduction, this section highlights the three main issues. **First**, it analyses the impact of algorithmic control imposed by platform companies and how this affects workers' livelihoods and working conditions. **Second**, it evaluates the social protection and justice measures implemented by these companies, considering whether they demonstrate a genuine commitment to the principles of decent work. **Finally**, it examines the existence and effectiveness of regulatory frameworks related to platform work, focusing on ride-hailing services and the extent to which these regulations offer meaningful protection for workers.

According to the World Economic Forum, Southeast Asia's digital economy was valued at USD 200 billion in 2020 and is projected to grow to USD 1 trillion by 2030. This expansion is driven by a rapidly increasing internet user base, which is expected to reach 600 million by 2025. The region's youthful demographic is a significant driver of this transformation, with over 50 per cent of the population under 30. This age group is instrumental in accelerating the adoption of digital technologies (Cahdha, 2023; The ASEAN, 2022).

Notably, the ride-hailing sector is projected to see substantial revenue growth, with estimates suggesting it will reach approximately USD 9.41 billion by 2025. The number of users in this sector is similarly expected to rise, reaching an estimated 218.49 million by 2029 (Statista, 2025). With this in mind, it is worth critically examining the implications of this rapid growth of platform work for the workers who sustain it. While digital innovation may present economic opportunities, it raises questions about the quality of work, labour rights, and the broader socio-economic conditions experienced by platform workers across the region.

### Demographic Profile of Platform Work in Indonesia and Cambodia

#### Indonesia

Around 4 million people in Indonesia have registered as ride-hailing drivers (Lubis, 2023). The number of users of these services is also expected to keep growing between 2025 and 2029, with an estimated increase of 18.3 million users—a rise of about 19.56%. By 2029, the total number of users will reach 111.89 million (Romero, 2025). This steady growth is driven by several important factors (Statista, 2025; Gunarso, 2023):

- Ride-hailing services offer a convenient and affordable mode of transportation, which has driven widespread utilisation among the public.
- Intense competition among ride-hailing companies, leading to price wars and aggressive marketing strategies, has significantly reduced fares, benefiting consumers.
- The inadequate development of public transportation systems in many urban areas reinforces the dependence on ride-hailing platforms.

These dynamics have fuelled the sector's growth, with projected revenue expected to reach approximately USD 3.75 billion by 2025 (Statista, 2025).

## **Cambodia**

There is no comprehensive national data on the number of ride-hailing drivers in Cambodia. However, more than 15,000 people are estimated to work with ride-hailing services in Phnom Penh alone (Vicheth, 2024). The ride-hailing market in Cambodia is expected to generate around USD 26.94 million in revenue by 2025, with an estimated 3.73 million users. Apps like PassApp and Grab have become especially popular, offering a more convenient and affordable way to get around (Statista, 2025).

In the Cambodian context, ride-hailing services have emerged as a popular mobility service due to (Ly, 2025; Statista, 2025):

- Urban transportation inefficiencies, particularly in cities like Phnom Penh, include traffic congestion, inadequate public transport infrastructure, and environmental concerns.
- Ride-hailing services offer a flexible and immediate solution by leveraging existing private vehicle fleets and digital technologies, unlike public transportation systems, which require long-term investment in infrastructure and central planning.
- It is convenient, as users can book rides at any time and location, eliminating the need to wait for taxis on the street. Further, real-time driver tracking and estimated arrival time also contribute to a great sense of reliability.

## **Issues Snapshot**

Although the growth of platform work, especially in the ride-hailing sector, might seem like a positive step in the digital economy, it comes with deeper structural issues. Unfortunately, these often lead to negative consequences for workers, who are most affected. The table below outlines the most commonly raised concerns, based on survey responses gathered through Google Forms in Indonesia and insights from an interview with a representative in Cambodia.

Table 2. Key Issues Identified in Platform-Based Work

Issue Category	Indonesia	Cambodia
<b>Algorithmic Opacity</b>	<ul style="list-style-type: none"> <li>• Non-transparent algorithmic decisions.</li> <li>• The algorithm fosters surveillance and exploitation (forced labour).</li> <li>• Prioritisation of new drivers over old ones.</li> <li>• Income unpredictability and control loss.</li> <li>• Punitive response to order rejections or time off.</li> <li>• Promotions benefit consumers/platforms but reduce workers' earnings.</li> </ul>	<ul style="list-style-type: none"> <li>• Non-transparent algorithmic decisions.</li> <li>• The algorithm fosters surveillance and exploitation (forced labour).</li> <li>• No income guarantees or revenue clarity.</li> <li>• Drivers are vulnerable to suspension owing to customer complaints.</li> <li>• Daily earnings are often low (under \$10).</li> </ul>
<b>Minimal Social Protection and Justice</b>	<ul style="list-style-type: none"> <li>• Worker rights (e.g., incentives, leave, accident compensation) are not guaranteed.</li> <li>• Limited or no contract clarity or sick leave.</li> <li>• Disputes are often ignored; accounts can be suspended unilaterally.</li> <li>• High pressure to meet incentive thresholds.</li> <li>• An algorithmic punishment cycle for poor performance.</li> <li>• Slow advocacy response from the platform.</li> </ul>	<ul style="list-style-type: none"> <li>• Worker rights (e.g., incentives, leave, accident compensation) are not guaranteed.</li> <li>• Lack of grievance redress mechanisms.</li> <li>• Gender-based challenges amplify worker vulnerability.</li> <li>• No safety guarantees.</li> <li>• Slow advocacy response from the platform.</li> </ul>
<b>Institutional Void</b>	<ul style="list-style-type: none"> <li>• Ineffective state regulation.</li> <li>• Excessive commission deductions.</li> <li>• Regulatory gaps (e.g., Law No. 22/2009 does not cover online transport).</li> <li>• Poor enforcement of fare-setting laws.</li> <li>• Weak coordination across governmental sectors.</li> <li>• Slow advocacy response from the platform.</li> </ul>	<ul style="list-style-type: none"> <li>• Ineffective state regulation.</li> <li>• Excessive commission deductions.</li> <li>• Workers are excluded from labour protections.</li> <li>• No insurance, pension, or healthcare provided.</li> <li>• The 'partnership' model is used to avoid employer responsibility.</li> <li>• Slow advocacy response from the platform.</li> </ul>

## The Lack of Transparency in Algorithmic Mechanisms: A Gamification and Coercion of Work Practice by Platform Companies

### Indonesia

Many participants reported that algorithmic mechanisms, particularly those governing order distribution and income calculation, lacked transparency and fairness. The majority experienced sudden drops in earnings or job availability, often without prior notice or clear explanation from the platform. Respondents overwhelmingly perceived the algorithm as unjust.

The most frequent concern was the platform's failure to disclose the criteria behind order allocation, leading to perceptions of arbitrary or biased treatment. For instance, several drivers noted that new drivers are prioritised, distorting earning opportunities. *"It's unfair because new drivers are prioritised, and long-time drivers struggle to get orders"* (Indra, Indonesia, April 2025). Others linked income volatility to platform promotions such as *"Grab/Gojek hemat"* or discount fare programs, which they say primarily benefit consumers and the platform, while reducing drivers' earnings (Dwi Priyani J, Gaspool Lampung, Indonesia, April 2025). Moreover, the algorithmic allocation of orders often results in uneven work distribution, causing driver incomes to fluctuate and working hours increasingly irregular and prolonged. Many workers view this system as exploitative and unfair, favoring the platform's profits while exposing workers to heightened economic insecurity and operational strain (Putra, 2025).

In addition, the lack of transparency in algorithmic mechanisms further reinforces the imbalanced power relations between platform companies and workers, with many perceiving the algorithm's use as a threat of punishment. Drivers reported that brief periods of inactivity, such as taking a day off or being absent for several weeks, often result in a noticeable reduction in order allocations. This creates an algorithmic surveillance and coercion environment that pressures workers to remain constantly available and responsive. Rather than providing flexibility, the system imposes subtle forms of disciplinary control that affect drivers' access to income. Management's use of opaque and punitive algorithmic processes creates a menacing work environment, where every task carries the risk of adverse consequences, such as:

- Earnings instability, as drivers' incomes fluctuate depending on how active they are on the app, regardless of their actual performance or effort.
- Loss of autonomy, with workers having little control over their schedules or ability to reject undesirable orders without facing negative consequences.
- Coerced acceptance of unprofitable or long-distance orders, as refusal may result in

reduced future job allocations.

- The absence of a minimum income guarantee leaves workers exposed during periods of low demand or system-driven exclusion.
- Mental and physical strain, driven by the pressure to stay active and competitive within an unpredictable, gamified system.

The situation has recently taken a tragic turn. On April 9, 2025, in Jogjakarta, a driver was found dead after continuing to work despite being in poor health. According to reports, the victim, suffering from illness, forced himself to continue working in an attempt to fulfil his livelihood requirements (Janati, 2025). This tragic event underscores the severe consequences of the pressures faced by platform workers. It highlights the potential for fatal outcomes resulting from the relentless demands placed on workers, driven by an algorithmic system that fails to account for their physical and mental well-being. A similar tragedy happened in Jakarta on 5 April 2025, when an online taxi driver was found dead in his vehicle (Sandi, 2025). Such incidents highlight the risks of an unsustainable work environment, where workers' health and lives are at risk in the race to earn money. These cases underline the urgent need to improve worker protections and hold platform companies accountable.

All of these issues are closely linked to the implementation of **gamification models**, which involve incorporating game design elements and principles into non-game contexts (Savignac, 2017). These mechanisms are supposed to motivate workers to maximise their earnings by encouraging them to meet trip quotas and maintain high performance, which is represented in points per order and rating systems (Nastiti, 2016). However, in practice, such systems often benefit platform companies disproportionately, while workers shoulder the risks and uncertainty.

A key structural problem that platform companies continue to address inadequately is the growing oversupply of workers. As the number of registered drivers increases significantly, the volume of available customers remains relatively constant. This imbalance results in heightened competition, making it increasingly difficult to reach the set targets. Consequently, many workers are now compelled to stay online and active for over ten hours a day in order to accumulate enough points or qualify for bonuses (Prabowo et al., 2019).

More concerning still, these extended hours often go uncompensated, particularly when workers operate beyond standard working hours without any additional incentives. There is no guarantee that their efforts will result in bonuses, creating significant economic insecurity. The current platform model harms workers' physical and mental health by encouraging constant, nonstop work.



The issue with this gamification model is also closely linked to uncertainty. One participant shared that he faced a dilemma: to accumulate the necessary points and be regarded as a high-performing driver, he was often required to accept ride requests from customers several kilometres away. In such cases, accepting the job would lead to a financial loss due to fuel expenses, as the fare did not provide sufficient compensation. However, rejecting the request would negatively impact his performance rating, as it would reduce his order completion rate (Yanuar Dwi Prastyo, Driver Online Bergerak, Indonesia, April 2025). This experience was echoed by another participant, who stated:

*“The platform system puts pressure on drivers to meet point targets, but achieving those targets is not always realistic, especially when there are few orders available, even after driving around the city extensively” (Iwan Suryawan, Gaspool Lampung, April 2025).*

This reflects what Nastiti (2016) describes as ‘super-exploitation,’ where platform companies take extra profits through power imbalance and intensified labour. This is often accompanied by erasing workers’ rights and shifting costs and risks onto the workers themselves. Within this relationship, gamification acts as a subtle form of control, where workers’ labour is quietly monitored and influenced.

Workers report being reluctant to take breaks for fear of algorithmic penalties, such as reduced customer visibility or temporary suspension. In effect, this dynamic imposes a form of forced labour, where workers feel compelled to remain online under the threat of punishment, stripping them of autonomy and subjecting them to the dictates of the algorithm. Further, research by Nastiti (2016) revealed that drivers will be automatically suspended if workers have below a 4-star rating. As one participant described:

*The algorithm controls drivers; we are forced to stay online indefinitely, and the pay feels ghost-like—uncertain and elusive (Supriyadi, Indonesia, April 2025).*

This testimony highlights the exploitative logic embedded in the gamified platform model and its impact on worker agency and well-being. Here are some participant stories regarding the unhealthy practices within the platform company's mechanisms.

*If we take just one day off, our orders drop drastically the next day. We're constantly being forced to work like robots, without rest (Muhammad Arief, Gaspool Lampung, Indonesia, April 2025).*

*The earnings are getting smaller than operational costs (Kennedi S, ADO, Indonesia, April 2025).*



*If we cancel an order, the platform company will lock the account for 5 minutes. If the cancellation occurs again, the account may be locked for up to 30 minutes, which is a discriminatory treatment (Syapri, Gaspool Lampung, Indonesia, April 2025).*

*Even though I have tried to stay consistently online, there are times when I still don't receive any orders. Additionally, when the deductions from each trip are calculated, they often exceed 20% (Rizal, ADO, Indonesia, April 2025).*

These outcomes illustrate how algorithmic control intensifies precarity and exacerbates structural inequalities between platform companies and their drivers while offering workers limited means of recourse or protection.

## Cambodia

Reflecting challenges similar to those in Indonesia, the discussion revealed deep concerns about the financial insecurity experienced by platform-based workers in Cambodia. The participant consistently reported receiving very low daily earnings, often insufficient to meet basic living expenses or support their families. In many cases, workers earn less than \$10 per day, while those who push themselves to work long, continuous hours, sometimes sacrificing meals and rest, may earn between \$15 and \$20. Such conditions reflect an exploitative model that incentivises overwork while disregarding workers' health and well-being.

In addition, participants described a range of unhealthy mechanisms embedded within platform company practices:

- **Absence of minimum income guarantees:** Workers shoulder disproportionate financial risk, particularly during off-peak hours or days when customer demand is low. Unlike salaried employees, they remain vulnerable to market instability without a safety net.
- **Unfair profit distribution:** While drivers work long hours under challenging conditions on the streets, platform company staff stay in comfortable office environments and receive a much larger share of the company's income. This unequal arrangement strengthens the view that the system is deeply unfair.
- **Algorithmic punishment:** The participant reported that platform algorithms heavily prioritise customer satisfaction. Even without context, a single complaint can lead to suspension or account termination, often without a fair review process. This reinforces unilateral control and further exacerbates worker insecurity.

Further research revealed that drivers affiliated with platform companies often worked longer hours and earned higher revenue. However, this came with a trade-off, as platform drivers faced significantly higher operating costs. Notably, despite earning less, many non-platform drivers were reluctant to join because they believed it would further reduce their limited income (Chalermpong et al., 2023).

These mechanisms create a labour environment defined by excessive pressure, limited protections, and widening inequality between platform operators and their driver workforce. Without regulatory intervention or structural reform, the system will likely continue marginalising platform-based transport workers while disproportionately benefiting corporate stakeholders. Further evidence from Cambodia highlights the tangible effects of algorithmic management on driver livelihoods:

- Many drivers report needing 12 to 14 hours daily to earn between \$15 and \$20, often forgoing meals and rest to meet income targets.
- Algorithmic systems constantly monitor driver activity, compelling them to accept more jobs and work continuously to maintain visibility within the app.
- Platform companies rarely provide accessible channels for drivers to contest decisions or seek redress, further strengthening the power imbalance.

Further, Vuthy Long, a representative from IDEA Cambodia, mentioned that “workers are essentially racing against time, earning only \$0.50 to \$1.00 per job, regardless of distance.” The algorithm does not account for the actual effort or cost involved; drivers are pushed to accept faraway pick-ups to maintain performance scores, while the platform consistently offers minimal compensation. This demonstrates how the gamification model forces workers into unsustainable choices to secure points or avoid penalties.

Central to workers’ experience is the constant menace of unpredictable algorithmic deactivation, a persistent threat that governs their labour. This ongoing menace cultivates a working environment that undermines autonomy, deepens financial insecurity, and restricts the capacity to challenge unfair treatment. With income uncertainty and the fast-paced, high-demand nature of platform-based work, these pressures often compel drivers to prioritise speed and earnings over personal safety. The data shows that 48.70% of drivers earning between \$301–500 have disobeyed traffic lights 1–5 times, whereas those earning only \$100–300 were documented as never having disobeyed traffic lights (IDEA, 2025), highlighting how financial pressure and algorithmic demands can directly influence risky behaviour on the road.

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Platform workers see this type of work as temporary—helping them meet immediate needs while looking for formal jobs—and they often end up stuck in forced-labour-like conditions. Tang Liheng (Business and Human Rights Resource Centre, 2024) shares that although he hoped the job would be short-term, since putting on the green jacket of a Grab-affiliated platform, he has had little chance to develop skills beyond picking up and delivering orders.

Without enhanced transparency and stronger institutional safeguards, the platform model risks entrenching cycles of exploitation and systemic inequality. Yet, awareness of the specific challenges transport workers face in Cambodia remains limited, partly due to a lack of comprehensive and sustained research on their conditions.

## Minimal Social Protection and Justice Measures

### Indonesia

Many participants report a persistent absence of fair labour standards within platform companies. Although platforms often claim that drivers are “partners,” they face work arrangements that mirror precarious employment. They are not entitled to formal labour rights such as sick leave, job security, or clear working contracts.

Participants also raised serious concerns about the difficulty of resolving disputes with platform companies. Customer service systems were widely described as bureaucratic and unresponsive, and many drivers shared experiences of being suspended or penalised without explanation or a chance to defend themselves, highlighting a significant power imbalance and lack of due process.

Several critical points emerged:

- **Absence of formal labour rights:** Despite performing essential services, drivers are denied basic employment protections, reinforcing structural vulnerability and economic vulnerability.
- **Lack of accessible grievance mechanisms:** Many workers reported being suspended or penalised without the opportunity to appeal, highlighting the absence of due process and the need for regulatory safeguards.
- **Unrealistic performance targets:** Platforms impose daily or weekly benchmarks (e.g., minimum trip quotas or point thresholds) as incentive preconditions. These expectations are often misaligned with on-the-ground realities, such as fluctuating customer demand or app inefficiencies.
- **Cycle of precarity:** Once deprioritised, workers receive fewer job opportunities, further limiting their ability to recover performance metrics, reinforcing a cycle of disadvantage without institutional recourse.

While some drivers have engaged in advocacy through associations, calling for better tariff structures, access to social protection schemes, and legal recognition of their employment status, these efforts have often been ignored by both platform companies and the government. This lack of response highlights the systemic neglect of gig workers' rights and their continued exclusion from justice mechanisms.

Additionally, health and employment social security provisions, such as BPJS, are considered inadequate. Most online transport drivers lack social security coverage, and among those who do have coverage, most are enrolled independently (Nurhadi, 2023).

- **Inadequate insurance coverage:** Only 23% of online transport drivers have accident insurance, and even then, the insurance often comes from their previous employer, not the platform they currently work for. This shows that platform companies are not taking responsibility for protecting their workers.
- **Limited scope of insurance coverage:** Even for those with insurance, coverage is restricted to periods when drivers are actively transporting passengers or picking up orders. Drivers are unprotected when driving without customers, exacerbating their vulnerability to accidents.

These findings further demonstrate the systemic neglect of platform workers' health and social security needs, revealing the urgent need for regulatory attention to ensure workers in the transportation sector, especially those in gig work, are included in universal health coverage and social protection schemes. Without such provisions, drivers remain at the mercy of the platforms, deepening the cycle of injustice.

Further, the saver programme (*program hemat*) introduced by platform companies reduces standard ride fares, shifting the financial burden onto drivers. For example, a typical fare of Rp 10,400 (approximately USD 0.65) may be reduced to Rp 8,500 (approximately USD 0.53), excluding a 20% commission paid to the platform. Drivers must subscribe to this programme to access customers, as most users favour the discounted option. This model forces drivers to accept lower earnings to remain competitive. The following are selected responses from participants in the preliminary survey, highlighting their experiences and perceptions of this issue.

*We have fought for fairer tariffs and protection for years, but nothing has changed. It's always just talk—no real action from the government or the platforms* (**Atung Adhansah Bastari, ADO, Indonesia, April 2025**)

*We once raised concerns at the Maxim office, and as a result, our contracts were terminated* (**Ric Tomretto, ADO, Indonesia, April 2025**)

*We were forced to purchase new attributes, such as uniforms or gear, and if we refused, our accounts would go 'cold'—meaning we would receive significantly fewer, if any, job orders* (**Muhammad Arief, Gaspool Lampung, Indonesia, April 2025**).

*There are no explicit guarantees regarding incentives or workers' rights. The platform's policies change frequently, often disadvantaging workers* (**Daniel Pura Tanya, ADO, Indonesia, April 2025**).

The lack of explicit guarantees regarding platforms' absence of genuine commitment to protecting workers' rights highlights the deep-rooted structural issues within the platform economy. This ongoing unresponsiveness from the government and platform companies underscores the failure to uphold workers' rights, further marginalising them in the labour landscape.

## **Cambodia**

The discussion highlighted several key issues platform workers face in Cambodia, particularly those working for major companies like Grab, Tada, PassApp, and E-Gets. While these platforms provide services that offer flexibility and accessibility, they often fail to provide essential protections for workers. The main points raised are:

- Female platform workers face heightened vulnerabilities compared to their male counterparts. Discrimination in terms of safety and working conditions is prevalent, with women being disproportionately affected by risks associated with night shifts.
- Societal perceptions that women are less capable than men in tasks requiring speed and reliability, such as commuting, further exacerbate women's challenges in the platform economy.
- Workers face barriers in achieving fair treatment, as platforms often fail to recognise their employee status, leaving them without the benefits of formal labour rights.

In the absence of formal labour protections, workers are forced to advocate for their rights independently. Unions, such as IDEA, have become instrumental in these efforts to negotiate better conditions and secure recognition within national labour frameworks. However, despite their critical role, responses from both platform companies and the government remain limited, significantly hindering the effectiveness of these efforts.

Due to the high levels of informality in Cambodia's labour market, only a small proportion of the population is covered by social insurance, leaving them highly vulnerable to lifecycle shocks and economic downturns. Workers in the informal sector often face uncertain working conditions and are excluded from social insurance coverage, further exacerbating their financial instability. In contrast, formal-sector workers benefit from more robust maternity-related protections.

For example, women are legally entitled to lighter work during the first two months after returning from maternity leave, and breastfeeding mothers are granted one hour per day to breastfeed within working hours for up to a year after childbirth. Additionally, businesses employing 100 or more women must establish a day-care facility for children aged 18 months to three years. However, informal-sector workers, including those in platform-based work,

rarely receive these protections (OECD, 2017). To date, there is no standardised employment contract format for transport workers, and most remain outside formal registration systems. Consequently, they cannot fully access state-supported social protection systems, including healthcare, occupational risk coverage, and pension schemes.

The minimal protections platform companies provide are evident in the harsh realities many ride-hailing drivers face in Phnom Penh. A 2024 report revealed that around 30% of the city's 15,000 ride-hailing drivers—approximately 4,500 individuals—are forced to sleep in their vehicles due to financial constraints, as they cannot afford rental accommodations (Vicheth, 2024). This situation highlights these workers' severe economic difficulties and raises significant concerns about their health and well-being.

Furthermore, during periods of high demand, platform companies may struggle to recruit sufficient drivers, resulting in delays and customer dissatisfaction. This, in turn, places additional pressure on drivers to work longer hours or accept more orders, further jeopardising their health and well-being. When drivers who cancel jobs or receive low customer ratings face algorithmic penalties, it reinforces an exploitative work system.

In the absence of a formal employment contract, many platform workers are subjected to excessive working hours, inadequate rest, and increased exposure to risks such as traffic accidents and violence while performing their duties. Data from IDEA (2025) shows that drivers over 40 have experienced at least three traffic accidents, while those aged 26–30 and 31–40 have experienced at least one and two accidents, respectively. These findings highlight the heightened vulnerability, particularly for the older workers within the platform work sector. Prolonged exposure to such living conditions, particularly when drivers spend extended hours on the streets without access to proper rest or facilities, can lead to both physical and mental health issues, further perpetuating their vulnerability in an already precarious working environment.



## Institutional Void: The Ineffectiveness of Government Regulation In Platform Work

### Indonesia

Regarding the role of the Indonesian government in platform-based work, most participants highlighted **the absence of effective state intervention in regulating the digital economy**. Specifically, they noted that Law No. 22 of 2009 on Road Traffic and Transportation (*Undang-Undang Nomor 22 Tahun 2009 tentang Lalu Lintas dan Angkutan Jalan*) does not extend to online transportation services. This regulatory gap results in a lack of specific provisions governing the operation of online transport platforms as part of the broader public transportation system. Consequently, the absence of legal recognition and oversight has undermined the protection of their labour rights, leaving them vulnerable to exploitation.

Although no regulation explicitly categorises online transportation services as public transport, fare-setting regulations exist. Through Minister of Transportation Regulation No. 118 of 2018 on the Operation of Special Hire Transport Services<sup>1</sup> (*Peraturan Menteri Perhubungan Nomor 118 Tahun 2018 tentang Penyelenggaraan Angkutan Sewa Khusus*), the national government delegates the authority to set minimum and maximum fares to regional governments. However, implementing this regulation has proven ineffective, as platform companies continue to set fares unfavourable to their driver-partners (Yuana et al., 2024).

As a consequence, several adverse effects have emerged:

- **Workers' incomes have become increasingly unstable and unpredictable**, as platform companies unilaterally adjust fare-setting mechanisms and incentive structures to their advantage.
- **Excessive commissions**, often surpassing 20%, are imposed by the platforms, further decreasing drivers' earnings.
- **Platform companies operate with minimal government oversight**, benefiting from the regulatory vacuum and consolidating their control over labour conditions.
- **Insurance protection remains highly limited**, typically covering only the duration when drivers actively transport passengers.
- **Drivers are left unprotected during crucial periods**, such as while travelling to pick-up locations or waiting between orders.

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<sup>1</sup> By definition, *Special Hire Transport* refers to a door-to-door passenger service operated by a driver within urban areas, which is booked through an information technology-based application (such as an online app).

These disadvantages stem from the regulation's narrow focus on the transportation sector, even though platform-based work is inherently multi-sectoral, intersecting with transportation, the digital economy, and labour frameworks. However, coordination among these relevant government sectors remains weak (Yuana et al., 2024). Given the inherently high-risk nature of ride-hailing work, such fragmented governance is widely regarded as inadequate, further underscoring the state's failure to protect platform-based transport workers' rights and welfare within the broader digital economy.

Most participants echoed these concerns, expressing frustration over the government's shortcomings in addressing the challenges faced by ride-hailing drivers. Below are selected perspectives from participants that illustrate their dissatisfaction and highlight the urgent need for regulatory reform.

*Although regulations exist, platform companies often fail to comply with them, disadvantaging workers and contributing to fluctuating incomes due to inadequate government protection of workers' rights. Furthermore, platforms impose numerous commissions, concentrating the benefits primarily on their side and leaving workers with limited economic security (Maechel, ADO, Indonesia, April 2025).*

*My income is still unstable, but it's sufficient to cover my daily needs. Currently, no regulation guarantees drivers' earnings. In addition, the absence of regulation has led to unfair competition (Yos Shanto, FDTOI, Indonesia, April 2025).*

*The current government regulations do not address the existing problems. They lack strict enforcement mechanisms, and the rules issued do not yet meet the needs of platform workers (Daniel Pura Tanya, ADO, Indonesia, April 2025).*

*Health and social insurance are provided, but the partners (drivers) bear the cost rather than the platform (Awaludin, Indonesia, April 2025).*

*Platform companies still deduct more than 20% from drivers' earnings without their knowledge or consent and only provide insurance coverage during active trips. As a result, drivers are not insured while en route to pick up passengers or between drop-offs and new assignments, leaving significant gaps in protection (Haryanto, ADO, Indonesia, April 2025).*

The findings indicate a widespread perception among ride-hailing drivers of insufficient government intervention and ineffective regulatory enforcement in the platform economy. While relevant regulations exist, their limited scope, weak inter-sectoral coordination, and lack of enforcement mechanisms have enabled platform companies to evade accountability.

## Cambodia

As in Indonesia, a recurring concern highlighted during the discussion was the absence of effective regulation. The Cambodian government has remained largely silent on issues affecting gig and platform workers, resulting in a regulatory “grey area” where companies operate with minimal oversight. A key source of this regulatory gap is the lack of coordination among relevant government ministries—namely, the Ministry of Commerce, the Ministry of Telecommunication, and the Ministry of Public Works and Transport (ITF, 2023). This institutional fragmentation has hindered the development of comprehensive, cross-sectoral policies capable of addressing the multi-dimensional nature of platform-based work.

Consequently, the gig economy structure often leaves drivers without job security, employment benefits, or a stable and guaranteed income. Platform firms are therefore able to evade responsibilities typically associated with formal employment, such as providing accident insurance, health coverage, and pension contributions. Workers remain systematically excluded from labour protections under existing legislation. Moreover, the absence of inter-ministerial coordination has led to regulatory ambiguity, weakened enforcement capacity, and a diminished ability to hold platform companies accountable for worker welfare.

It is acknowledged that the Cambodian government issued a regulation on the Conditions and Procedures of Granting Permits to Companies Providing Digital Services for Road Transportation, dated 21 June 2021. This regulation focuses primarily on the mechanism for granting permits to companies in the online transportation sector, determining the conditions, registration procedures, and processes for operating in this space (Seng, 2021). According to the regulation, all companies wishing to operate road transportation services via digital technology must register with and obtain a permit from the Ministry of Public Works and Transport (MPWT). However, while this regulation sets out operational guidelines for the platforms, it falls short in some critical areas (Interview, May 1, 2025):

- The regulations regarding driver qualifications, vehicle safety, and insurance provision remain minimal and inadequately enforced. In particular, the absence of clear and strict rules on these subjects exposes workers to potential harm. Data from IDEA (2025) shows that 82.50% of drivers do not hold a licence, while only 17.50% are documented as licensed.
- The regulation does not mandate sufficient insurance coverage for workers, leaving them vulnerable to accidents.

This concern was highlighted by Vuthy Long, a representative from IDEA Cambodia, who shared:

*The platform company does not pay into the National Social Security Fund for us as workers. There is no support or protection provided. According to Cambodian labour law, all companies must contribute to the social security fund for their workers, but the platform company I work for does not fulfil this obligation.*

As a consequence, platform workers in Cambodia remain highly vulnerable. State-provided social protection schemes do not cover them and lack access to institutional mechanisms for addressing grievances. When accidents occur during work, platform companies often fail to respond adequately, frequently justifying their inaction by citing the absence of a formal employment relationship.

Although the Cambodian government has introduced a pilot initiative through the National Social Security Fund (NSSF), access to healthcare services under this scheme remains conditional. Drivers must enrol in the programme and make a monthly contribution of 15,600 riel (approximately \$3.85), with services accessible only after two consecutive months of payment. However, in a highly competitive and precarious work environment marked by unequal treatment, concerns regarding the affordability and fairness of this model persist (Kimmarita, 2023; Sopheavotey, 2023).

Rather than mandating platform companies to provide health insurance and assume responsibility for worker protection, the burden is placed on the workers themselves. This arrangement reinforces the structural imbalance between platform companies and workers, while also reflecting the state's limited regulatory intervention in securing fair and equitable labour protections. Data shows that only 0.65% of workers have insurance, while 99.35% do not, as workers are reluctant to spend money on insurance given their already limited earnings (IDEA, 2025).

## RECOMMENDATIONS

Based on the data analysis, urgent action is required to address the structural problems that continue to shape the platform work ecosystem, which harm workers. A key issue is the *lack of transparency in algorithms*, which control how jobs are given out, how workers are evaluated, and how they are paid, with little clarity or accountability. These systems also use gamification, like points, badges, and rankings, to encourage workers to work harder. While these tools are presented as motivation, they hide the reality of unstable work and shift the risks and pressure onto individual workers.

Compounding this is the *lack of adequate social protection and justice*, as platform workers remain excluded from fundamental labour rights and welfare entitlements afforded in formal employment. These conditions reflect deeper systemic inequalities perpetuated under the guise of flexibility and innovation. Crucially, the persistence of these injustices is enabled by the absence of robust state regulation.

*The institutional void*, stemming from the government's failure to implement comprehensive and enforceable policies, allows platforms to operate with minimal accountability. Therefore, the state must assume a more protective role, ensuring not only the presence of regulatory frameworks but also their effective enforcement in safeguarding workers' rights and advancing social justice within the platform economy. The following proposed approach offers potential pathways for addressing the documented challenges, grounded in empirical data collected from participants in Indonesia and Cambodia.

### Algorithmic Opacity

- **Platform companies must proactively ensure transparency and fairness in their algorithmic systems.** Since algorithmic management largely decides which workers get jobs, how much they earn, and disciplinary actions, the lack of transparency leads to mistrust, a feeling of powerlessness, and a sense of unfairness among workers. To tackle this, platform companies should:
  - Communicate clearly how key algorithmic processes function.
  - Provide workers with explanations and justifications for significant algorithmic decisions affecting their earnings.
  - Engage in regular dialogue with workers to co-develop ethical algorithmic practices and promote shared understanding.
- Platform companies should enhance **transparency around calculating earnings and assigning jobs** to help drivers better anticipate and plan their income. Providing clear and easy-to-understand information about fare structures and incentives is crucial to reduce financial uncertainty.

- Platform companies should **revise their algorithms and gamification systems to ensure a fairer distribution of ride requests and reduce wage inequality**. They must avoid designs that encourage excessive work and promote healthier, more sustainable working conditions. This could be implemented by including reminders for rest breaks and health-related prompts within the app.
- Platform companies must **regulate maximum work time, including a mandatory rest period and maximum hourly thresholds**, to prevent driver fatigue and unsafe driving.
- It is essential to promote **voluntary participation in gamified systems**. As driver competition intensifies, drivers should be able to opt out of reward schemes without penalty, allowing them to set their working hours free from algorithmic pressure.
- The platform should **integrate a distance-based adjustment system** into its gamification model. Specifically, when a ride request exceeds a certain kilometre threshold, **drivers should not be penalised for rejecting it**. However, those who accept such requests should still receive performance points and be fairly compensated, ensuring that the job remains financially viable.
- Platform companies should **reconsider strict suspension policies** for driver cancellations by recognising that multiple legitimate factors, such as safety concerns, unfair destinations, or personal emergencies, often inform these decisions. A more flexible and transparent approach is needed.
- **Fair and accessible appeal procedures** must be established, allowing workers to challenge automated decisions, supported by human review.

## Minimal Social Protection and Justice

- **Platform companies should restructure commission policies** to ensure driver earnings meet a minimum viable income threshold before platform fees are deducted. This guarantees drivers are falling into financial insecurity and allows them to sustain a decent livelihood. Income stability must be treated as a core principle of platform design.
- While the classification of platform workers as employees remains debated, **platform companies should provide health insurance coverage** to address the vulnerability of accidents and health risks associated with road work. Platform companies must contribute to health insurance schemes to create a sustainable and mutually beneficial ecosystem, ensuring workers have access to necessary medical care and financial protection in case of injury or illness.
- It is recommended that the **ILO continue to support and invest in strengthening dispute resolution mechanisms** within the platform work industry and advocate for enforcing regulations that require platform companies to comply.



- Platform companies should implement **simple, low-bureaucracy grievance procedures with fast response times** to ensure workers can report issues, such as unfair suspensions, payment problems, or safety concerns, without delay.
- **Platform companies should treat all accident claims equally**, regardless of whether or not the driver was transporting a passenger during the incident. All claims related to work activity should be processed daily and promptly, recognising that risks are inherent throughout the entire duration of work.
- Platform companies **should implement gender-sensitive measures** to address risks and inequalities faced by women and gender minorities. This includes integrating safety features into the app and flexible work options for caregiving responsibilities.
- Platform companies **must promote transparent and fair leave policies, which are essential**. Drivers must be allowed to take breaks or time off without penalising their future income opportunities. To ensure these policies reflect workers' diverse realities, companies should also create meaningful channels for **dialogue and advocacy**, promoting an inclusive and supportive working environment.

## Institutional Void

- There is an **urgent need to formally recognise platform workers as employees rather than allowing their continued classification as 'partners.'** The lack of legal recognition and adequate regulation has resulted in unclear governance structures and significantly increased precarity.
- **The government should proactively facilitate tripartite dialogues** between platform companies, workers, and state representatives to shape equitable and decent platform work ecosystems collaboratively. These dialogues must ensure that all parties have equal opportunity to voice concerns, propose solutions, and influence policies affecting labour conditions, social protections, and platform accountability.
- Given the cross-sectoral nature of the ride-hailing industry, **strong horizontal coordination is urgently needed** across relevant government ministries. Each ministry has a distinct yet interrelated role in ensuring that platform companies adhere to decent work standards and that regulatory frameworks are coherently formulated to prevent overlap across national and local levels, for instance:
  - The Ministry of Transportation should oversee and regulate the operational standards and safe protocols.
  - The Ministry of Communication and Information Technology should ensure digital infrastructure, data governance, and algorithmic transparency.
  - The Ministry of Manpower should enforce labour standards and social protection measures. This collaborative effort is needed to encourage



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platform companies to uphold decent work standards.

- Beyond regulating the licensing process, the government should **implement rigid fare structures** that set clear minimum and maximum fare limits. Further, worker protections should be firmly established and enforced.

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