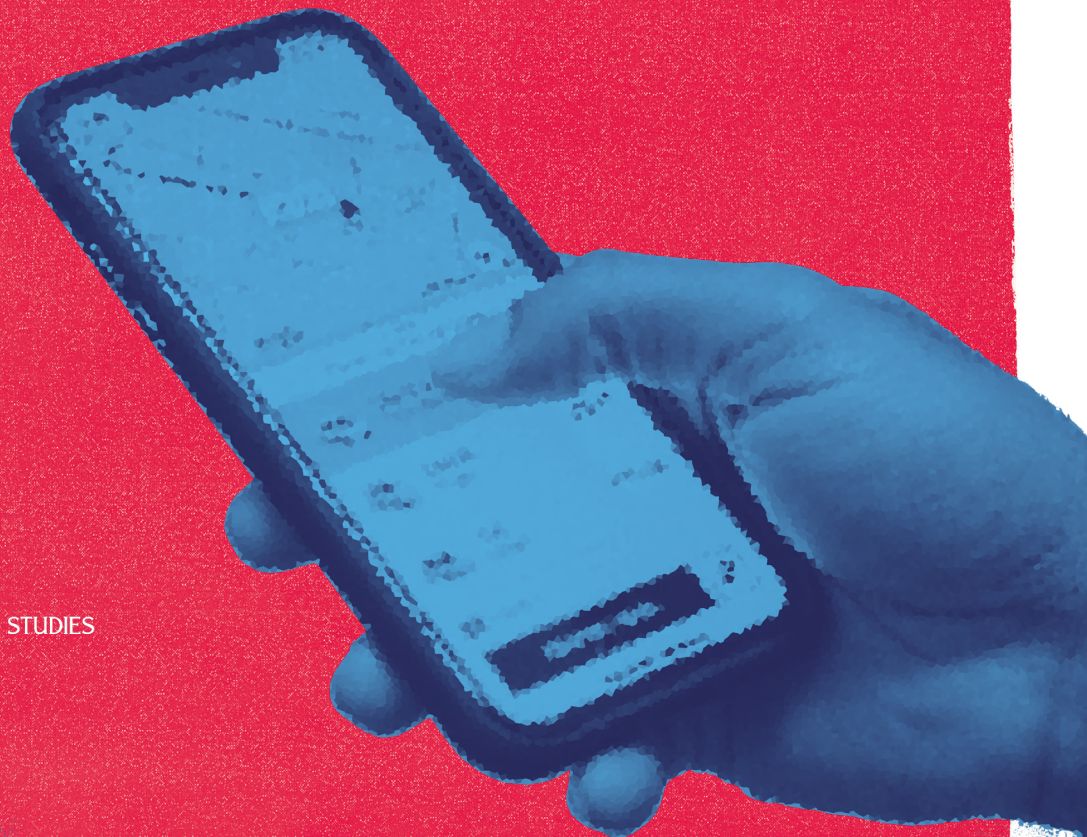


Fairwork Thailand Ratings 2025:

Setting a Baseline for Decent Work
in Thailand's Platform Economy



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EXECUTIVE SUMMARY

This report presents the findings of the first scoring of platform companies against the five Fairwork principles in Thailand. Seven platform companies were evaluated, including six ride-hailing and food delivery services and one domestic worker platform. The findings of this report present a baseline for working conditions in the platform economy in Thailand.

The evaluation combined desk-based research with interviews of platform workers. Final scores were jointly determined by the Fairwork Thailand team and were subsequently reviewed by Fairwork researchers from other country teams.

The findings of the scoring are contextualised in an overview of the economic, social and legal background of the platform economy in Thailand. They are further exemplified through a closer look at BeNeat, Bolt, and ShopeeFood, as examples of domestic work, ride-hailing, and food-delivery platforms, respectively. The report further highlights how workers routinely smooth over operational problems in platform operation, picking up the slack where algorithms fail. The report ends with an outlook on the future and potential pathways for change.



Fairwork Thailand Scores 2025

Minimum standards
of fair work

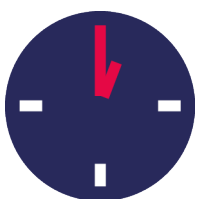
BeNeat	2 /10	
Bolt	2 /10	
inDrive	2 /10	
Grab	1 /10	
LINE MAN	1 /10	
ShopeeFood	1 /10	
Robinhood	- /10	





Fair Pay:

Among the platforms evaluated, only the workers on the domestic work platform BeNeat could be shown to earn above the minimum wage of 400THB (~US\$12.34) per 8-hour working day.¹ While our findings indicated variations in earnings across platforms, all ride-hailing and food delivery platforms reviewed failed to provide enough evidence to earn the first point for this principle. Our data suggests that work for these platforms is characterised by long working hours well beyond the legally mandated maximum of 48 hours a week, with workers routinely reporting to work more than 10 hours a day. Thus, when their earnings are averaged across working hours, our evidence shows that most workers fall well short of the minimum wage. None of the platforms reviewed earned the second point for workers earning at least the local living wage which has been estimated at 792THB (~US\$24.50) per 8-hour working day.²



Fair Conditions:

None of the platforms reviewed earned a point for Fair Conditions. While our data suggests that some Platforms like Grab and LINE MAN offer free insurance for their workers, according to our evidence, other platforms like ShopeeFood and Robinhood make their insurance conditional on job performance, or provide no insurance at all as in the case of BeNeat, Bolt, and inDrive. There is no evidence to suggest that any of the platforms reviewed provide working and safety equipment to their workers free of charge or contribute to worker's social protection. In addition, our evidence suggests that many platforms incentivise risky behaviour such as excessively long working hours and fast driving through their payment and incentive systems.



Fair Contracts:

All platforms reviewed, except Robinhood, could be shown to provide their workers with clear and accessible terms and conditions and a privacy policy to protect workers' data, earning the first point for this principle. However, all terms and conditions we reviewed include clauses that exclude platform companies from any liability concerning working conditions, preventing any of the platforms from earning the second point for this principle.





Fair Management:

While according to our data, all platforms provided avenues for workers to contact human representatives of the platforms to solve issues with customers or restaurants and appeal deactivation or other punishments, evidence suggests that these channels are often slow, and appeal processes are not experienced as meaningful. Consequently, except for Bolt and inDrive, none of the platforms reviewed earned the first point for this principle.

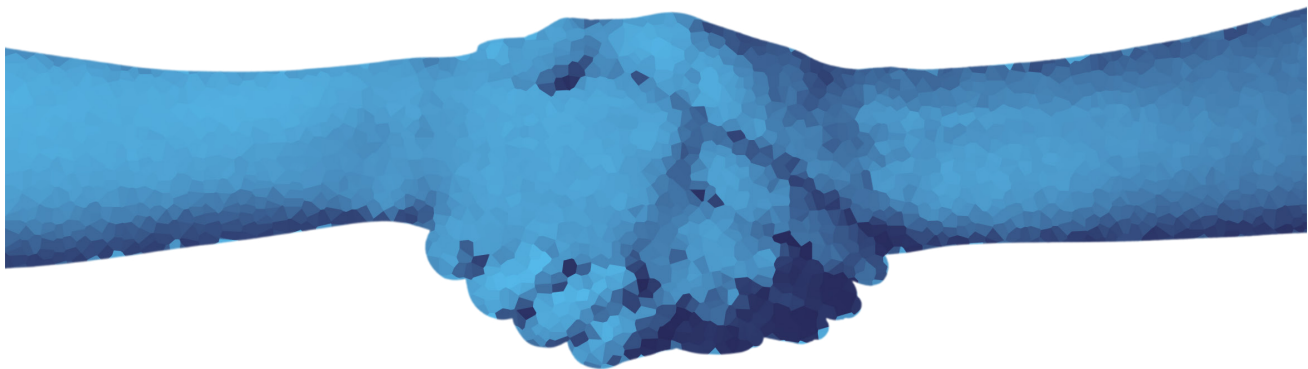
Grab, LINE MAN, and Robinhood could be shown to offer fast responses to worker inquiries and complaints, but workers report that their complaints are not taken seriously by the platforms. Other platforms, such as ShopeeFood, have channels for workers to contact the platform but our evidence suggests that it can take up to multiple days for workers to reach a human representative. In addition, for some platforms such as LINE MAN and ShopeeFood, workers report that they cannot accept new orders while their issue is being processed, leading some riders to pay for the order themselves instead.

In contrast to most food delivery and ride-hailing platforms, worker accounts suggest that BeNeat keeps in close contact with its workers and offers easy access to platform representatives through a phone hotline. But the terms and conditions we reviewed included clauses that deny its workers the right to appeal bad ratings or deactivations. Additionally, workers report that the platform checking in on them is often due to checking whether they arrive at work on time or similar.



Fair Representation:

None of the platforms reviewed could provide evidence to show that they support or acknowledge in any way the collective expression of worker voices through unions or other forms of worker organisation. Consequently, none of the platforms reviewed earned any points for this principle.



Benchmarking Fairness in Thailand's Platform Economy

The platform economy in Thailand is expanding both in size and scope, with increasing numbers of workers and platforms in an ever growing number of sectors. In response, policymakers have identified the digital economy in general and the platform economy in particular as a potential driver to vitalise Thailand's stagnant economy.

At the same time, there has been a lively debate among workers and civil society organisations on how to achieve better working conditions and social protection for platform workers. Despite this attention on the platform economy, to date, there is no comprehensive assessment of working conditions in the Thai platform economy that could serve as baseline to track potential progress. This report aims to fill this gap, serving as a basis for further advocacy and research.

Throughout the scoring process, it became clear that the details of platform's business models and operations influence the working conditions of workers. BeNeat, the only platform earning a point for Fair Pay and the only domestic work platform reviewed, exemplifies this. Despite earning a point for Fair Pay our evidence suggests that BeNeat's higher wages are not due to any mechanisms ensuring minimum pay but are related instead to BeNeat limiting its pool of workers to current demand in order to ensure high commission fees for the platform. In fact, BeNeat could be evidenced to have a few mechanisms in place that can be argued to disadvantage its workers. For instance, according to our findings, it requires domestic workers to pay a high deposit for potential property damages. While protecting its customers, BeNeat is also the only platform that could not be shown to offer any channels for workers to appeal customer ratings or platform disciplinary decisions, such as temporary bans or deactivation.

Where a platform originates influences its commitment to rights-based approaches. For instance, in contrast

to local and regional platforms, our research shows that the Estonian platform Bolt has global anti-discrimination and inclusion policies. Bolt is next to inDrive the only platform that could be shown to clear the threshold for the first point for Fair Management. Additionally, according to the terms and conditions we reviewed, it is the only platform that limits the liability of its workers to some extent, potentially pointing towards the influence of stricter regulations and a more progressive climate regarding labour rights in Estonia. However, evidence also suggests that this influence is limited, and Bolt's commitment to diversity and workers' rights does not necessarily translate into action in the local market, leaving many workers to label Bolt as a ride-hailing platform with insecure working conditions.

Overall, given the lack of regulation in Thailand and recurring platform worker protests, the low ratings of platform companies were not surprising, demonstrating that there is a lot of room for improvement. However, the legal context of the platform economy in Thailand is changing, with several new pieces of legislation under deliberation, including those relevant to worker rights. The three platforms in focus in this report – BeNeat, Bolt, and ShopeeFood – show that effective local regulations are key to improving the working conditions of platform workers. Thus, we are hopeful that initiatives such as Fairwork and other worker-led initiatives can contribute to a better and fairer platform economy in Thailand.

Towards Decent Labour Standards in the Platform Economy

Fairwork evaluates and ranks the working conditions of digital platforms. Our ratings are based on five principles that digital labour 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 can 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, University of Oxford, and the WZB Berlin Social Science Center. Our network of researchers has rated platforms in 41 countries across five continents. In every country, Fairwork collaborates closely with workers, platforms, advocates and policymakers to promote a fairer future of platform work. In Thailand, this research is led by researchers at Chulalongkorn and Thammasat University.

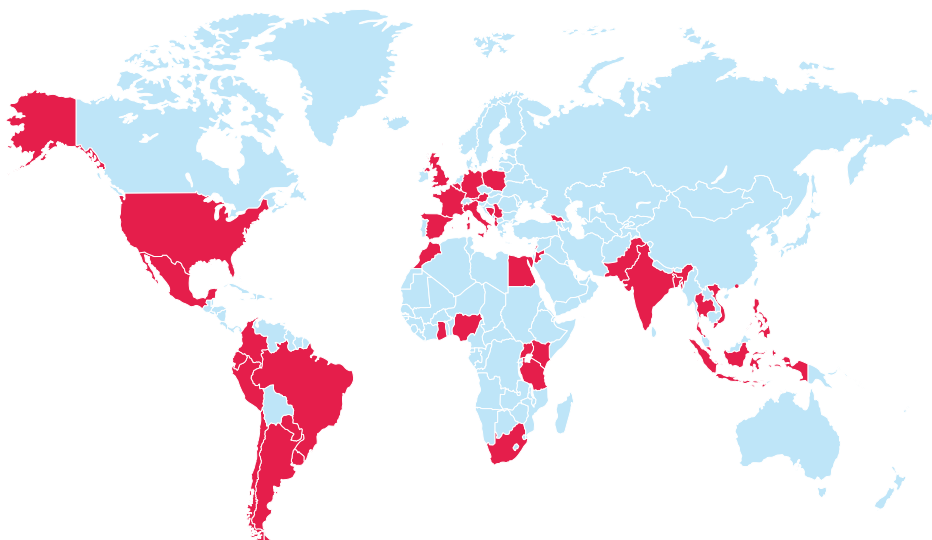


Figure 1: Map of Fairwork countries

- **Africa:** Egypt, Ghana, Kenya, Morocco, Nigeria, South Africa, Tanzania, Uganda
- **Asia:** Bangladesh, India, Indonesia, Jordan, Lebanon, Pakistan, Philippines, Singapore, Thailand, Vietnam

- **Europe:** Albania, Austria, Belgium, Bosnia and Herzegovina, Croatia, 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

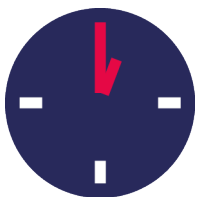
Fairwork evaluates the working conditions of digital labour platforms and ranks them on how well they do. To do this, we use five principles that digital labour platforms should ensure to be considered as offering ‘fair work’. The five Fairwork principles were developed through a multi-stakeholder workshop at the International Labour Organisation (ILO), and many more workshops in various countries. In the years since then, the principles and their operationalisation have been further fine-tuned. Further details on the thresholds for each principle, and the criteria used to assess the collected evidence to score platforms, can be found in the Appendix.

STEP 1 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.



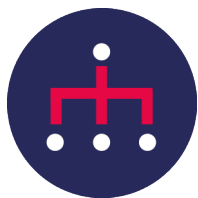
Fair Conditions

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 should be 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 should be transparent and result 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.



STEP 2 Methodology Overview

The Fairwork project uses three approaches to effectively measure fairness of working conditions on digital labour platforms: desk research, approaching platforms for evidence, and worker interviews. Through these three methods, we seek evidence on whether platforms operate in accordance with the five Fairwork 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 gather and analyse a wide range of publicly available documents including contracts, terms and conditions, published policies and procedures, as well as digital interfaces. Desk research also flags 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.

Once the list of platforms has been finalised, each platform is invited to participate in Fairwork's annual ranking study and provided with information about the process. This year, seven prominent platforms operating in Bangkok were identified.

Platform evidence

The second method involves approaching platforms for evidence. Platform management are invited to submit evidence and discuss the platform's degree of compliance with each of the Fairwork principles. Evidence may include published policies and/or standard operating procedures, public commitments, and website/app functionality. This evidence 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 managements do not agree to participate in the

research, we limit our scoring to evidence obtained through desk research and worker interviews.

Worker interviews

The third method is interviewing platform workers directly. In Thailand, 52 workers were interviewed across Bangkok. These interviews do not aim to be a statistically representative set of experiences. Rather, they are worker case-studies to examine platforms' policies and practices in the field as they pertain to the Fairwork principles. Specifically, they seek to gain insight into how work is carried out, and how work processes are managed and experienced, on platforms. The interviews situate platform work in the careers of workers by understanding their motivation for entry into a platform, how long they envision undertaking work on the current platform before seeking an alternative either on another platform or in a different sector, and how their experience of platform work is shaped by their interaction with fellow workers and the external labour. These interviews also enable Fairwork researchers to see copies of the contracts issued to workers and to access the app interface, including payout and support screens. This method alerts the team to the presence of issues, but not the frequency or likelihood of their occurrence.

The worker interviews are semi-structured and make use of a series of questions relating to the 10 Fairwork (sub)principles. In order to qualify for the interviews, workers have to be over the age of 18 and have worked with the platform for at least three months. In Thailand, these interviews were conducted in Thai.

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 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 sufficient 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 unable 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. Platforms are 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 report.

Before the publication of this report, companies rated were given the opportunity to review and comment on the findings of this report. All responses are included in Appendix II.

Further details on the Fairwork scoring system are in the Appendix.



Stalling Development and High Informality

The platform economy in Thailand has emerged in a context of prevailing informality and high acceptance for flexible forms of work. Initially attracting workers with high earning potential, a surge of new workers during COVID-19 has led to a continuous reduction in pay. From the main sector of ride-hailing and food delivery, the platform economy is expanding into other sectors, such as domestic work.

Thailand, the third largest economy in Southeast Asia,³ has undergone rapid industrialisation and economic development starting in the 1980s. Over the period, it was transformed from a mainly agrarian society into a middle-income country with an economy based on manufacturing and services. High economic growth rates meant increasing opportunities for millions of people and higher public budget, which translated into a large reduction of poverty, better access to education, and expansion of social protection. Overall, the standard of living in Thailand has increased rapidly over this period.⁴

However, following the Asian financial crisis in 1997, Thailand's economic growth has slowed down, and over the last ten years has mostly stagnated. Thailand was among the hardest hit countries during the Asian financial crisis, experiencing a large decrease in economic output, financial sector breakdown, and consequently large-scale unemployment and an increase in poverty.⁵ Since then, the Thai economy has not recovered its previous rapid pace of development, instead entering a phase of stagnation which has stalled poverty reduction and productivity growth.⁶

While the crisis was rooted in the financial sector, it also revealed structural challenges in the Thai economy that are still impeding Thailand's development today. Thailand is one of the most unequal countries in the world, with 10 percent of the population holding 75 percent of the wealth.⁷ There are also large levels of spatial inequality between urban and rural areas.

Thailand also has consistently high levels of informal employment, with just over half (52.7% in 2024) the workforce working informally nationwide.⁸ The largest sectors of informal work outside of agriculture include home-based work, domestic work, vendors, and transportation.⁹ Of particular interest are traditional motorcycle taxis, so-called Win drivers, as they are in direct competition with emerging platforms. Emerging in the 1980s, Win drivers have since become a significant feature of Thailand's urban landscape.¹⁰ Positioned at the entry to alleyways and other strategic locations, they provide a crucial service connecting Bangkok's main transportation networks to its deep alleyways.¹¹ Their strategic locations and strong social networks have given them a degree of influence with policymakers.¹²

The Platform Economy in Thailand

It is in this context that the first platform companies entered the Thai market in 2014, offering ride-hailing services in Bangkok. Early platforms, including Uber and Grab, focused on car and motorcycle ride-hailing services. Their services were in direct competition with existing taxi and motorcycle taxi services, cutting prices and evading regulations. While early platform companies were able to integrate regular taxis into their platforms, the existing socially embedded organisation of Win drivers clashed with the rational operation of platforms, leading to sometimes violent clashes with platform workers.¹³ However, neither these conflicts nor initial government attempts to crack down on platform operations hindered the quick expansion of the platform economy.

The early period of the platform economy in Thailand was characterised by quick expansion and relatively high earning opportunities. Initially focused on ride-hailing, the platform economy quickly expanded into food delivery. At the same time, the number of platform companies in the country grew rapidly, with both regional and local players competing for the Thai market. During this time, platform work offered relatively high earning opportunities, enticing many workers to join the platform workforce.¹⁴ Thailand's stagnating economy and high acceptance and appreciation of the flexible work associated with platforms and other forms of informal work offer further incentivised workers to join the platform economy.

It can be argued that the platform economy took off in the wake of the Covid-19 pandemic. Restrictions on in-restaurant dining meant a massive increase in demand for food delivery, while at the same time many workers entered the platform labour force. High levels of informal employment meant that a lot of workers lost most of their income due to Covid restrictions, leading to a surge in platform workers.¹⁵ However, at the same time, platform companies began cutting pay

rates, gradually turning what had once been decent earnings into wages that many workers could no longer get by on.

During the Covid-19 pandemic, platforms also gradually expanded into other areas of Thailand. Initially primarily focused on Bangkok and other urban areas, platforms such as FoodPanda began to expand their services to rural areas. However, due to large rural-urban inequality and consequently lower spending power in rural areas,¹⁶ this effectively created two classes of platform workers, with rural workers earning much less than their urban counterparts. Today many platforms offer their services nationwide, while the gap in pay between rural and urban areas remains.

In 2021, there were an estimated half a million platform workers in the transportation and delivery sectors alone.¹⁷ The main players in ride-hailing and food delivery today are the Singaporean company Grab, the local company LINE MAN, and ShopeeFood, a subsidiary of regional e-commerce giant Shopee. Other players include Bolt, operating out of Estonia, and inDrive originated from Russia. Other platforms such as FoodPanda and Robinhood had to suspend services or are slowly failing. In addition to ride-hailing and food delivery there are also several domestic work platforms, the largest of which is BeNeat.



Today the platform economy in Thailand is an important part of people's everyday lives and a potential driver for economic growth. In 2024, the online food delivery and transportation sector was estimated at 4 billion THB (~US\$12.3 million) or roughly 0.75 per cent of overall GDP.¹⁸ However, other studies claim that, when considered more broadly, the economic impact of platform companies can be much higher, estimating that the largest player Grab alone contributed directly and indirectly roughly 1% to national GDP in 2023.¹⁹ In response to this economic potential, policymakers

have identified the platform economy and the digital economy more broadly as potential drivers to help Thailand boost its stagnating development. This focus is reflected in high level national development policies such as the Thailand 4.0 policy, which aims to transform Thailand into an innovation-driven, high-income economy,²⁰ but also in upcoming legislation on the platform economy, which focuses predominantly on leveraging the platform companies for economic growth.



Legal Reforms and Persistent Precarity for Platform Workers

The key issue regarding the legal context of platform work in Thailand is whether platform workers should be classified as employees or independent contractors. In Thailand, the Labour Protection Act B.E. 2541 (1998), defines an employee as “a person who agrees to work for an employer in return for wages regardless of the names used.”²¹ However, whether this definition applies to platform workers is contested. Platform companies insist that their workers are independent contractors, labelling them partners, while some riders and civil society organisations call for them to be classified as workers. To date, platform workers operate under the classification of independent contractors.

The classification of platform workers as independent contractors leads to limited access to social protection. The majority of Thailand’s social protection system is geared towards formal employees. While Thai platform workers have the possibility to voluntarily enter the Social Security Fund under Section 40 of the Social Security Act, the platforms do not co-contribute like firms do for regular employees, and social protection coverage is lower. Consequently, many riders decide not to participate in the government’s social security scheme. Additionally, contractors are not entitled to participate in the Workmen’s Compensation Fund, which aims to protect workers against accidents at work, an important aspect for many platform workers in Bangkok’s dangerous traffic.²²

A further implication of this classification is the restriction on worker organisation and collective bargaining. Under the Labour Relations Act B.E.

2518 (1975), only employees are entitled to various protections such as unfair dismissal and provisions protecting employee representatives. Furthermore, the Act limits the establishment of worker organisations for collective bargaining to employees. These conditions effectively undermine the ability of platform workers to organise, and while they have formed worker groups that engage in dialogue with platforms and government, these are not recognised as unions and thus not protected under the Labour Relations Act.²³

In recent years, Thailand has introduced new legal instruments to regulate digital platforms. The first platform-specific legislation was the Royal Decree on Digital Platform Services (B.E. 2565).²⁴ The Decree mandates platforms operating in Thailand to notify relevant authorities, defines the platform’s scope, and introduces data protection and other consumer-focused measures. A second more comprehensive piece of legislation, the Draft Digital Platform Economy Act, is currently under deliberation. The act would introduce a tiered classification system for platforms based on their size, add more user protection measures, establish clear governmental oversight mechanisms, and regulate competition in the platform economy.²⁵

In 2025, Thailand’s Electronic Transactions Development Agency (ETDA) issued two additional notifications that introduce further compliance requirements specifically for ride-hailing platforms. First, the notifications designate all ride-hailing platforms as high-impact digital platforms under the Royal Decree, which carries more stringent

notification requirements. Second, a range of technical and operational requirements of both platforms and workers were introduced. For ride-hailing workers these include the requirement to register their vehicles under a public licence for providing transportation services like traditional taxis and motorcycle taxis. For platforms these notifications mean that they need to implement technical measures including comprehensive verification procedures for workers, real time GPS tracking estimated routes, travel times, and fares for both workers and customers, secure communication channels between workers and customers that protect workers privacy, emergency assistance systems in app, and complaint channels for both workers and customers. Additionally, the platforms must report the total number of vehicles registered on the platform and methods used for calculating service fees.²⁶ These requirements just came into effect in July 2025 and consequently have not yet been implemented by many platforms. However, they open the pathway to more comprehensive regulation and improved working conditions for workers.

Another significant draft relevant to platform workers is the Independent Workers Protection and Promotion Act, introduced by the Ministry of Labour in 2022. The bill aims to strengthen the rights of informal workers by establishing a legal framework that explicitly encompasses platform workers within its scope. Under the draft, independent workers (แรงงานอิสระ) are divided into two subgroups: independent contractors (ผู้ประกอบอาชีพอิสระ), referring to individuals who work without an employer, and semi-independent contractors (ผู้ประกอบอาชีพกึ่งอิสระ), referring to those engaged in platform-mediated work.

Although this draft introduces a new category, both subgroups remain outside the scope of the Labour Protection Act and the Labour Relations Act, which guarantee fair wages, benefits, and the rights to association and collective bargaining through unions. By contrast, independent workers remain excluded from these protections. The proposed Act, however, seeks to extend a basic set of rights to both subgroups, including the ability to form collective bargaining groups, minimum standards for remuneration, timely payment, limits on deductions, and compensation for termination. It further provides for occupational safety protections, the creation of a Contribution Fund jointly

financed by workers and platforms to support welfare and training, and the transfer of jurisdiction over disputes between workers and hirers from civil to labour courts.²⁷ Oversight of these measures would fall under a newly established Independent Workers Committee (IWC), a tripartite body comprising representatives from the state, employers, and workers, responsible for policy coordination, registration of labour groups, and fund management.

Despite these progressive provisions, several structural and governance concerns have been raised. Despite the inclusion of the Contribution Fund, the law does not yet specify clear criteria or mechanisms for workers to access the fund, raising concerns about transparency and accountability. Moreover, the proposed governance structure of the Independent Workers Committee, composed of approximately 28 members, reflects an unequal power balance within the tripartite system. All committee members are appointed by the Minister of Labour, with representation distributed as follows: 10–16 from the government, four from platform employers, and eight from workers' organisations. This composition reflects a state-dominated governance structure that raises concerns over representational balance and independence. Furthermore, while the law differentiates between semi-independent and independent workers, factual differences between the two groups are minimal, with the key difference being the number of workers required to form collective bargaining groups (5 for independent workers and 15 for semi-independent workers). This raises further questions about the coherence and fairness of the categorization and its implications for worker representation and collective rights.²⁸

In addition to these challenges, the future of the Independent Workers Protection Act is uncertain. Despite a cabinet resolution in 2022, there has been little progress in the legislative process since. Key reasons are multiple changes in governments and political turmoil, which have left the act on low priority. Additionally, there is some opposition among some rider groups and civil society organisations to platform workers' classification as semi-independent workers.²⁹ Consequently, the future legal situation of platform workers remains uncertain.

Fairwork Thailand Scores 2025, by Principle

Minimum standards
of fair work

BeNeat	2 /10	● ● ○ ○ ○ ○ ○ ○ ○ ○ ○ ○
Bolt	2 /10	● ● ○ ○ ○ ○ ○ ○ ○ ○ ○ ○
inDrive	2 /10	● ● ○ ○ ○ ○ ○ ○ ○ ○ ○ ○
Grab	1 /10	● ○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○
LINE MAN	1 /10	● ○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○
ShopeeFood	1 /10	● ○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○
Robinhood	- /10	○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○ ○

The scores in this report rely on data collected using the Fairwork Framework as described in an earlier section. Following desk research, the Fairwork Thailand team interviewed 52 workers from seven platforms in Bangkok and collected evidence from the management of platforms who engaged with us. Appendix I provides further details of the evidence used to score each point in 2025 and how it was collected.

Explaining the scores

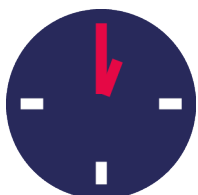


Fair Pay

In Thailand, the minimum wage is set at a daily rate that varies between provinces. In Bangkok, where our study was conducted, the daily minimum wage is set at 400THB (~US\$12.34).³⁰ To earn this point platforms need to show evidence that all their workers earn above the minimum wage while logged into the app. Because according to our data most platform workers work above the legally mandated maximum weekly working hours of 48 hours a week, which is the basis for minimum wage, we assessed worker's earnings against the calculated hourly minimum wage of 50THB (~US\$1.55). To this end, we estimated hourly earnings of workers after costs, including vehicle fuel and maintenance, working equipment, insurance costs, and mobile data.

None of the delivery and ride-hailing platforms provided enough evidence to earn the first point of this principle. Based on our evidence, none of the platforms reviewed had mechanisms in place to ensure that their workers earn at least the minimum wage. While some workers interviewed reported earnings above the minimum wage, most workers reported that their income after costs fell below that threshold. Additionally, our evidence suggests that platform workers' earnings are often dependent on performance and internal metrics. The exception is BeNeat, the only domestic work platform reviewed this year. All BeNeat workers interviewed reported earning significantly above the minimum wage, earning the platform the first point for Fair Pay.

To earn a second point for this principle, platforms must demonstrate that all platform workers earn above the living wage after costs. In Thailand the living wage has been determined to be at least 792THB (~US\$24.50) per day.³¹ Based on our evidence none of the platforms reviewed were able to meet this threshold.



Fair Conditions

To earn this point, platforms must demonstrate that they provide training and equipment free of charge, as well as take measures to mitigate risks. According to our evidence, none of the platforms reviewed met this threshold.

While most platforms could be shown to deliver training, our evidence suggests that no platform provides equipment free of charge. Only BeNeat, Bolt, Grab, inDrive, and LINE MAN could be demonstrated to have working emergency response systems in their apps in case workers encounter emergencies while at work. Additionally, our data suggests that only LINE MAN and Grab provided free non-conditional accident insurance to their workers. According to our findings, ShopeeFood and Robinhood also offer free accident insurance, but they make insurance coverage conditional on job performance.

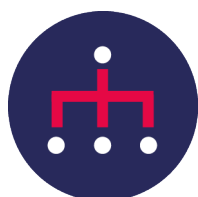
To earn the second point for this principle, platforms need to show that they take meaningful steps to contribute to workers' social protection, do not penalise long absences from work, and mitigate risks of working for the platform such as traffic accidents. None of the platforms scored could be shown to meet this threshold. In particular, evidence suggests that all ride-hailing and food delivery platforms have incentive systems that may incentivise risky behaviour such as driving fast or during heavy rain. Additionally, none of the platforms could be shown to contribute to the social protection of workers. While evidence indicates that some platform such as ShopeeFood provide social protection-related activities such as health check-ups, there is no evidence to suggest that these activities cover all workers.



Fair Contracts

To earn the first point for this principle, platforms must require workers to consent to understandable terms and conditions before starting to work, and must make them available to workers. Further, platforms should not include clauses that revert prevailing legal frameworks, and should have a privacy policy. Except for Robinhood, all platforms reviewed earned one point for Fair Contracts.

In contrast, none of the platforms reviewed earned the second point for this principle. The main reason for this is that, according to our evidence, all platforms had clauses in their terms and conditions that exclude their liability for working conditions. Additionally, none of the platforms reviewed could be shown to document their algorithms transparently.



Fair Management

To earn the first point for this principle, platforms must provide due process for decisions affecting workers, including fair appeals mechanisms and effective communication channels. While our evidence indicates that most platforms reviewed offered avenues for workers to contact human representatives to resolve issues with customers or restaurants and appeal deactivations or other penalties, it also shows that these mechanisms are often slow or ineffective. Bolt and inDrive were the only platforms reviewed that could be shown to meet this threshold.

Workers report that Grab, LINE MAN, and Robinhood offer relatively quick responses to worker inquiries and complaints. However, they also report that their concerns are rarely taken seriously or lead to meaningful outcomes. According to our data, ShopeeFood provides contact channels, but workers stated that it can take several days to reach a human representative. Moreover, our evidence suggests that on platforms such as LINE MAN and ShopeeFood, riders are unable to accept new orders while their complaint about an unresolved delivery is being processed, leading some to pay for the order themselves to continue working. According to workers, BeNeat maintains closer contact with its workers and provides direct access to platform representatives through a phone hotline. However, according to its terms and conditions, workers do not appear to have the right to appeal against bad ratings or deactivations. As a result, no platform reviewed in Thailand could be shown to meet the Fairwork threshold, and none was awarded the first point for this principle.

To earn the second point for this principle, platforms need to demonstrate that they provide equity in the management process through anti-discrimination policies and other measures to support diversity and inclusion in the workforce. None of the platforms reviewed received the second point for this principle. Whereas some platforms evidenced policies or activities in this direction, none demonstrated that these had a systematic impact on workers. For instance, while Bolt could be shown to have global Equal Employment, Anti-Discrimination & Anti-Harassment and Diversity and Inclusion policies, there is not enough evidence to suggest that they are being implemented meaningfully in Thailand. Similarly, according to our research, inDrive includes a section on Anti-Discrimination in its terms and conditions but lacks any evidence of their implementation. Grab, on the other hand, could be shown to carry out activities geared towards the inclusion of disadvantaged groups such as older persons or people with disabilities. But there is no evidence to suggest that they have a systematic impact on Grab's workforce.

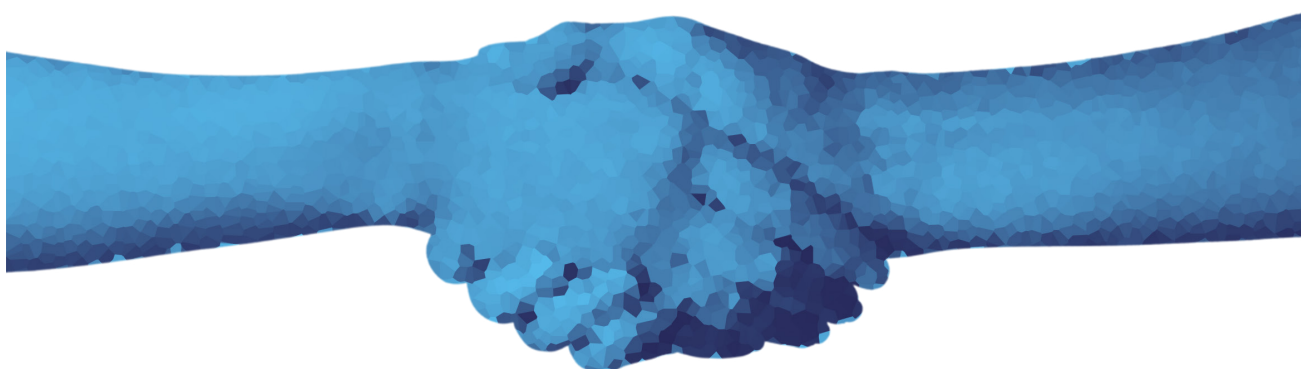


Fair Representation

To earn a point for this principle, platforms must provide channels for the collective expression of worker voices and ensure freedom of association. None of the platforms reviewed met this threshold. It is, however, important to note that this is also encouraged through Thailand's legal framework. Because platform workers are classified as self-employed, they are not allowed to form worker organisations or engage in collective bargaining.

Nevertheless, there are several informal worker organisations that, in some cases, engage in dialogue with platforms such as LINE MAN, Grab, Foodpanda, and Lalamove. However, these mechanisms are informal and not open to all workers; this, in combination with a lack of official recognition of any such worker organisation, bars these and other platforms evaluated from earning this point.

To earn the second point, platform companies must demonstrate that their workers are meaningfully engaged in governing the platform or publicly and formally recognise an independent collective body of workers, an elected works council, or trade union. None of the platforms scored cleared this threshold.



PLATFORM IN FOCUS

BeNeat

Principle	First Point	Second Point	Total
 Fair Pay	1 Ensures workers earn at least the local minimum wage after costs	- Ensures workers earn at least a local living wage after costs	1
 Fair Conditions	- Mitigates task-specific risks	- Ensures safe working conditions and a safety	-
 Fair Contracts	1 Provides clear and transparent terms and conditions	- Ensures that no unfair contract terms are imposed	1
 Fair Management	- Provides due process for decisions affecting workers	- Provides equity in the management process	-
 Fair Representation	- Assures freedom of association and the expression of worker voice	- Supports democratic governance	-
BeNeat's total score			2

BeNeat, a local company, is the first domestic work platform operating in Thailand. The platform started operation in 2016, with the aim to offer per visit domestic services to urban consumers. The platform has grown considerably since then; in 2024 it operated in 10 provinces and had about 10,000 platform workers.³⁵

As the only domestic workers platform, BeNeat stands out from the other platforms reviewed this year. It is also the only platform earning the first point for the Fair Point principle, with all workers reporting earnings well above the minimum wage. However, it could not be shown that all workers earn above the living wage, leading to BeNeat not earning the second point. In addition, evidence suggests BeNeat charges high rates of commission from workers, with rates as high as 37% of the service fee.

Evidence suggests that BeNeat provides high quality training to its workers including safety aspects of cleaning and client interactions. BeNeat could also be shown to provide initial working equipment such as aprons and cleaning supplies (though workers report that these are not provided for free).

In contrast, it could not be shown that BeNeat takes meaningful steps to protect workers from accidents or other adverse events during work. There is no evidence demonstrating that BeNeat offers accident insurance to its workers, despite workers' reports of a high risk of traffic accidents on the way to and back from work. Additionally, evidence shows that BeNeat collects a deposit of 10,000 THB (~US\$309.38) from its workers to cover potential property damage, representing a significant proportion of workers' average monthly income. The deposit is collected through an initial payment of 2,000 THB (~US\$61.88) upon registration, and then the system subsequently deducts 20% of workers' weekly earnings.

BeNeat could also be shown to put customers over workers in other aspects. Evidence suggests that, as the only platform reviewed, BeNeat does not give workers the right to appeal bad customer ratings or punishments of the platform. Workers report that this has a big impact on their working conditions. For instance, according to worker's stories, a task often takes longer than the time assigned and paid for, but

workers do not dare to complain due to fear of low customer ratings. Another common complaint were sudden cancellations.

Another aspect that differentiates BeNeat from other platforms is its policy in picking workers, as suggested by evidence. The terms and conditions reviewed in this study clearly note that only female workers are accepted for cleaning services, while other forms of domestic work are open to all genders. This contrasts strongly with the ease of entry for all workers on other platforms.

Lastly, like all the platforms evaluated in this study, BeNeat could not be shown to support or acknowledge in any form the expression of workers' collective voices, and evidence suggests that any form of organisation is much harder for domestic workers. Where there is evidence of some forms of worker organisation and some engagement with government and platforms for other platform workers, the findings of this study indicate that domestic platform workers are much more isolated, and do not even engage in social relationships with each other. For instance, some workers reported that in the case of jobs that require multiple workers, there is often no solidarity between them. This could be explained by the fact that, as customers have more choice in which worker is chosen for their job, domestic platform workers compete much more directly against each other than their counterparts in ride-hailing and food delivery.

PLATFORM IN FOCUS

Bolt

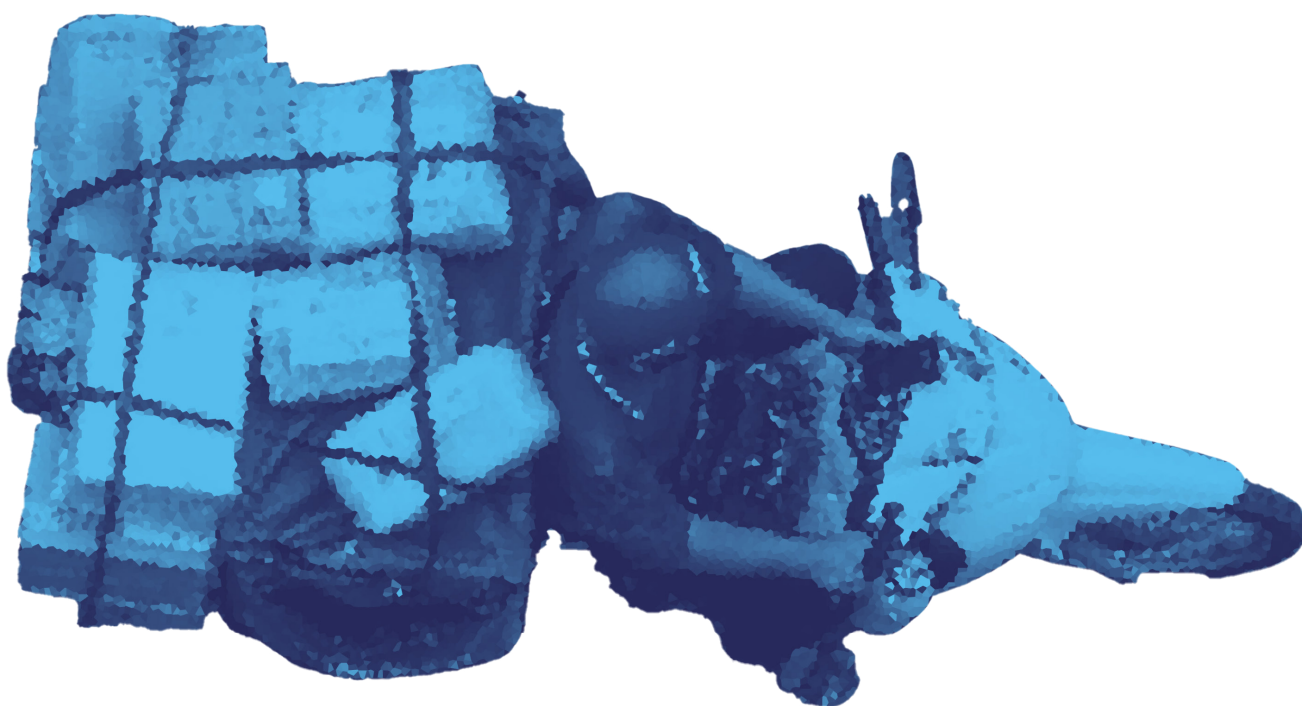
Principle	First Point	Second Point	Total
 Fair Pay	 Ensures workers earn at least the local minimum wage after costs	 Ensures workers earn at least a local living wage after costs	
 Fair Conditions	 Mitigates task-specific risks	 Ensures safe working conditions and a safety	
 Fair Contracts	 Provides clear and transparent terms and conditions	 Ensures that no unfair contract terms are imposed	
 Fair Management	 Provides due process for decisions affecting workers	 Provides equity in the management process	
 Fair Representation	 Assures freedom of association and the expression of worker voice	 Supports democratic governance	
Bolt's total score			

Bolt, an Estonian ride-hailing platform, entered Thailand in 2020 to challenge a market long dominated by Grab and LINE MAN.³⁶ The companies' European origin binds it to strong worker and data protection frameworks and formal diversity commitments. However, in Thailand, Bolt's local implementation presents a stark contrast. Despite its international reputation, many Thai drivers perceive Bolt as one of the least worker-friendly platforms.

At launch, Bolt adopted a low-cost, low-commission model to attract drivers and passengers rapidly.³⁷ However, our evidence suggests that Bolt's dynamic pricing systems complicate workers' ability to earn a stable income. Drivers report earnings that fluctuate significantly based on demand, distance, and algorithmic incentives, with no evidence for mechanisms to ensure minimum or living wages. Fare adjustments and bonus schemes remain opaque to the workers interviewed for this report, reinforcing broader concerns about algorithmic fairness.

Safety and working conditions are additional major concerns. There is no evidence to suggest that Bolt provides accident or health insurance or supplies uniforms or safety equipment, leaving drivers responsible for both physical and financial risks. Additionally, evidence suggests that digital tools like an in-app SOS button and online tutorials exist, but that helmets, jackets, delivery boxes, and income support for injury or illness are absent. In addition, workers report that per-order pay structures can incentivise risky driving, especially during peak hours or when bonuses are available.

However, our findings suggest that in contrast to most other platforms Bolt has that communication and grievance mechanisms that are experienced as meaningful by workers earning it the first point for Fair Management. Another area where Bolt differentiates itself from other platforms is that it could show to have global corporate diversity and inclusion policies. However, there is no evidence to indicate that they are



implemented locally. Similarly, Bolt is the only platform reviewed that could be shown to include clauses in its terms and conditions that limit rider liability to some extent, but despite these clauses Bolt does not share the liability with workers.

In addition to precarious working conditions, Bolt's and other ride-hailing platforms' entry to the Thai market could be shown to create tensions with traditional motorcycle taxis; so called Win drivers. Unlike established motorcycle taxi services, which operate under strict public transport regulations, evidence suggests that Bolt is bypassing licensing these requirements, creating unfair competition and undermining the regulated system. According to our evidence, early open-registration policies required minimal verification and did not mandate criminal background checks, a measure only introduced later after government intervention. Additionally, workers report that they could operate with privately registered motorcycles despite government regulations

mandating ride-hailing workers to register for a public transport licence. Consequently, many Win drivers felt compelled to join Bolt themselves to stay competitive, creating a dynamic where informal platform work increasingly overlaps with and disrupts the regulated market.

However, regulatory changes are beginning to reshape the platform landscape. From 2 October 2025, all ride-hailing drivers must register under the ETDA system as licensed public transport drivers. Platforms must ensure vehicle registration, driver licensing, fare compliance, insurance coverage, and digital ID verification. Non-compliance risks account suspension or legal penalties. Bolt has responded with driver support programmes such as "Booster Week," helping with registrations, discounts, insurance coverage, and bonuses.³⁸

Looking ahead, Bolt faces significant strategic and regulatory challenges. Ensuring safety, earnings



predictability, and transparency will be crucial for driver retention and consumer trust. Compliance with ETDA registration, licensing, insurance, and digital ID verification is essential but may increase costs for part-time and informal drivers. Opportunities exist to strengthen driver protections further. It could expand insurance coverage, clarify fare calculations and incentives, and improve communication channels for grievances. Given its European roots and EU obligations, the platform has the potential to align more closely with these standards by providing comprehensive safety equipment, clearer contracts, and better support mechanisms.

In sum, Bolt's operations in Thailand highlight a gap between its European commitments and local practice. While providing opportunities for informal and part-time workers, evidence indicates that the platform exposes drivers to financial and physical risks, disrupts traditional motorcycle taxi services, and relies on opaque algorithmic structures. How Bolt navigates new regulations and strengthens protections will

determine whether it can bridge this gap or lag behind competitors. Concurrently, government regulatory enforcement to effectively oversee foreign platforms like Bolt will be essential in safeguarding worker welfare, ensuring consumer trust, and maintaining a fair competitive market.



PLATFORM IN FOCUS

ShopeeFood

Principle	First Point	Second Point	Total
 Fair Pay	 Ensures workers earn at least the local minimum wage after costs	 Ensures workers earn at least a local living wage after costs	
 Fair Conditions	 Mitigates task-specific risks	 Ensures safe working conditions and a safety	
 Fair Contracts	 Provides clear and transparent terms and conditions	 Ensures that no unfair contract terms are imposed	
 Fair Management	 Provides due process for decisions affecting workers	 Provides equity in the management process	
 Fair Representation	 Assures freedom of association and the expression of worker voice	 Supports democratic governance	
ShopeeFood's total score			

ShopeeFood launched in Thailand in 2021 and is today the third largest player in the food delivery sector.³² ShopeeFood is a subsidiary of the e-commerce giant Shopee and as such its business model differs from other food delivery platforms.³³ While the food delivery side of operations functions like other apps, ShopeeFood workers also deliver parcels for Shopee's e-commerce platform. Workers can choose to work both food and parcels or only one of the two.

Evidence suggests that ShopeeFood workers had one of the highest incomes among food delivery and ride-hailing platform workers. However, according to our data, they earned just above or below minimum wage, leading to ShopeeFood not scoring a point for Fair Pay. There are indications that a key driver of the higher income of ShopeeFood workers is the platform's business model. Workers report that there is more work available to workers than on other platforms, leading to higher incomes, which could be attributed to its parcel delivery being driven by the Shopee e-commerce platform.

Despite the better income opportunities, workers frequently mention that working conditions for ShopeeFood are worse than for other platforms. ShopeeFood offers free insurance, but according to its website, insurance is tied to job performance.³⁴ Additionally, evidence suggests that its bonus system

incentivises long working hours, which increases the risk of accidents.

Workers further report that getting in touch with human representatives of ShopeeFood is difficult. A worker explained that while its call centre used to operate with human operators, it has since been replaced by a web form through which workers can file their complaints or grievances. They will then be contacted back during business hours, which workers report can take a long time during which they are not able to accept other orders. Consequently, some workers choose not to complain when customers do not pay for an order, but to pay for it themselves to be able to keep working.

Not being able to effectively appeal bad ratings or punishments is especially worrisome for riders as our evidence suggests that ShopeeFood has a very strict system for punishments. According to workers, the platform operates a point system under which even the smallest infractions such as a slow delivery or cancelling an order will lead to points. These points are added up on a rolling monthly basis, and once they lead to a certain threshold riders report that they will be punished. Punishments range from short 15 minute bans, not being able to pick between parcel and food delivery, to complete deactivation. Workers report consistently that ShopeeFood has harsher punishments than other platforms.



Precarity in Thailand's Platform Economy

Working to the Limit: The Reality Behind Platform Flexibility

At first glance, Ploy's* story seems to confirm platform promises of empowering workers through the opportunity of flexible work. However, a closer look reveals the excessively long working hours necessary to make a living as a rider and the inherent dangers that come with long hours on the road. As Ploy put it: "Working as a rider is not worth the risk. But I have no choice."

Ploy is a thirty-year-old single mother of three and has been working as a full-time rider for three years. She currently works mainly on ShopeeFood, for about 8-10 hours a day, six days a week. In between orders, she also picks up her children from school and takes care of other household chores. She says that she values the flexibility of setting her own working hours, as she wouldn't be able to take care of her children otherwise. The hours she is working are the minimum necessary to make ends meet while allowing her to take the time to recover from working. However, she has not always taken the time needed to rest. When starting out as a rider, she would work much longer hours trying to earn as much money as possible. This is encouraged through the platform payment system which incentivises long working hours through bonus payments for a set number of completed orders. According to Ploy, it is impossible for her to reach these targets within the 8-10 hours she is working now.

Working long hours to reach incentive targets and

maximise earnings can place a heavy toll on riders' health. Ploy recounts: "One day I just fainted while riding my motorbike because I had been working all day until 1 am." When she woke up, she found herself in the hospital with a broken jaw and leg and a totalled motorbike. Ploy made a full recovery, but other riders are not so lucky. One of her friends just recently passed away due to a traffic accident at work.

Accidents can also have devastating financial impacts on riders. It took Ploy two months to recover from her injuries before she could get back to work; two months without any income or support from the platform or government. Luckily, Ploy had private insurance that covered the 100,000 THB (~US\$3093) hospital and motorbike repair bill and some savings that could tide her over this time.

Ploy concludes: "It is important that you have a system for yourself, so that you don't work too much". This rings especially true as ShopeeFood, according to the data gathered for this report, does not take responsibility for the risks of its riders. While ShopeeFood offers accident insurance, workers report that it is tied to job performance and difficult to claim, which leads many riders not to use it. Ploy didn't receive any support from the platform for her accident. In fact, when she returned to work after her two months recovering, she received fewer orders due to her inactivity, reducing her income.

Ploy's story highlights the precarity of platform work. While flexible, platform work often requires excessively long working hours for workers to make ends meet. In Bangkok's traffic, long working hours and little

rest greatly increase the risk of traffic accidents. However, while this risk is inherent to platform working conditions, platforms often do not take responsibility for it, leaving workers to fend for themselves.

From Alley to Algorithm: A Traditional Motorcycle Taxi's Uneasy Ride with Bolt

**Bolt gives you money,
but it takes away your
freedom.**

Bunjong*, a 60-year-old Win driver has spent most of his working life serving passengers around his local neighbourhood. Six months ago, mounting debt compelled him to join the Bolt platform. Traditional Win work yields modest earnings of about 500–600 (~US\$ 16-19) THB per day, barely enough to cover daily expenses. In contrast, driving for Bolt allows him to earn between 1,200 and 1,600 THB (~US\$ 38-51) per day.

The key to achieving higher earnings lies in the adoption of electric motorcycles (EVs), which eliminates fuel expenses and enables longer working hours. By rotating between two EV bikes, one running while the other charges, he can work continuously from 5:00 AM to 8:00 PM, maximising income while minimising downtime.

Yet this increased income comes at a cost. Despite the income improvement, Bunjong admits he drives for Bolt out of compulsion rather than choice. “I drive Bolt because I have no choice. If I don’t, I can’t pay my debts,” he said. He misses the community and slower rhythm of Win driving: “You can sit, talk, and chill with friends. It’s easier on your body and mind.”

Bunjong describes Bolt’s management system as “dictatorial.” The platform controls nearly every aspect of his work while offering little transparency. He claims that its credit system automatically suspends job dispatch when his account falls below –700 THB

(~US\$ 22), forcing repayment to resume work. He estimates that Bolt deducts over 20% of each fare through commissions and taxes, though the exact amount remains opaque.

He also notes fare inconsistencies, with rates often falling below the legal ten baht per kilometre and sometimes as low as five baht. According to Bunjong, Bolt retains unilateral authority to modify fares at any time. Meanwhile, he reports that the app’s dispatch system presents ride requests for only a few seconds, pushing drivers to use “auto-accept” mode and take jobs without checking destinations. According to him, this frequently results in long, uncompensated pickup trips and operational risks.

Although Bunjong has achieved “Diamond” driver status thanks to his high rating and acceptance rate, he finds the incentives, such as small discounts on fuel or insurance, largely irrelevant. His main frustration lies with the platform’s rating system, which he views as heavily biased toward customers. After a passenger unfairly downgraded his score, he decided not to report the incident: “It’s just harmful to my mental health. Thinking about it won’t make anything better.”

Even when an accident occurred, Bolt offered no assistance, leaving him to pay the passenger’s medical costs out of pocket. “They don’t take responsibility. You’re on your own” he said. These experiences reinforce his belief that the company prioritises consumers while shifting risks entirely onto drivers.

For Bunjong, Bolt represents a reluctant dependence, a system that offers financial stability while stripping away professional autonomy. According to him, the platform dictates fares, controls access to work and provides little recourse for drivers to challenge unfair treatment. His story reflects a broader reality in Thailand’s platform economy: a trade-off between livelihood and independence. As he put it simply:

**I’m earning more
but owning less.**

Yet returning to the Win system remains difficult under current economic and regulatory conditions. Still, he hopes for a future where Win drivers can compete on fair terms. He wishes to return to Win driving if the system could be modernised with its own platform and backed by stronger legal protections.

If I could change one thing, I would want Bolt to respect the law. If the law becomes strong, and Win has its own platform to compete, then we will win.

Beneath BeNeat: The Hidden Life of Bangkok's Platform Cleaner

Ae* is a 53-year-old female domestic worker on the BeNeat platform. Like many domestic workers she migrated to Bangkok from the northeastern region after completing primary education to seek wage employment in Bangkok's then booming manufacturing sector. However, amid the country's prolonged economic downturn triggered by the Asian financial crisis, the volume of work and payment rates dropped, leaving her with insufficient income to sustain her livelihood. As the country's economy was unable to generate sufficient formal employment to absorb the influx of migrant labour, she was left stranded in the informal economy.

Up until her late 40s Ae worked as a live-in domestic worker, facing persistent economic insecurity and lacking autonomy over her own life. The years of instability and dependence weighed on her. Her path is a familiar one in Bangkok; a journey from the countryside to the city, from factory floors to other people's homes, and eventually into the shifting world of platform work. Domestic work platforms now offer what seems like a better deal. More pay, more freedom, and the sense, at least, of working on one's own terms.

Upon encountering an online advertisement for BeNeat, she decided to try working as a platform-based domestic worker. The idea of choosing her own hours and earning more than before appealed to her. She signed up, hoping the platform would give her a little more control over her life. Four years on, Ae found that although the platform offers higher earnings, shorter working hours, and the flexibility to choose her own schedule, working for a platform presents its own challenges.

Ae often receives cleaning assignments in which clients underestimate the actual scope of work. For instance, a task that realistically requires 90 minutes to complete is frequently booked by clients as a one-hour cleaning service. Consequently, she often ends up working beyond the scheduled time without any additional compensation. She believes that BeNeat should adopt a tripartite job assessment system involving clients, housekeepers, and the platform to determine scope of work, as the current system allows room for clients to take advantage of workers.

She explains that the platform places far greater importance on clients than on workers. On one occasion, she received a two-star review from a client who mistakenly believed that she had been neglecting her work. When a platform administrator contacted her



to inquire about the incident, Ae provided a detailed explanation of what had happened. Nevertheless, the administrator ultimately sided with the client, choosing not to correct her rating. This unfairly low score subsequently affected her future work opportunities on the platform.

Ae's story reflects the precarious and exploitative dimensions of domestic platform work, situated within the broader narrative of rural-to-urban migration and informal labour in Bangkok. It also highlights how many platform workers are accustomed to the flexibility and precarity of platform work. Ae replaced the precariousness of manufacturing sector with the flexibility and precariousness of platform work, with the key difference that the latter provides her with higher earning potential. Many workers count earning potential and flexibility as more valuable than the social protection formal work offers, given the low levels of benefits Thailand's social security system provides.

Although the platform economy has provided her with the opportunity to transition from working as a live-in domestic servant to becoming an independent cleaner, offering comparatively higher income and greater flexibility than other forms of informal employment, her working conditions are still determined by clients and the platform. Moreover, the absence of social protection remains a critical concern as it remains uncertain how much longer she will be physically capable of sustaining such labour-intensive platform work.

Sliding Cakes, Spilled Drinks, and Everyday Calculus of Survival

Kasidit*, a 50-year-old Grab food delivery rider, works mainly around Bangkok's Bang Khae district. For three decades, he worked as a car painter, until years of breathing toxic fumes pushed him to trade the workshop for the open road. Since joining Grab in late 2023, his days now stretch to eight hours on the saddle chasing an 800-THB (~US\$ 24.60) daily goal. "Some days I reach it, some days I don't. It depends on luck, traffic, and what kind of orders I get." Luck may matter, but survival on the platform is less about fortune and more about constant calculation. Every

ride is a balancing act between earning and risk, between endurance and exhaustion.

To stay afloat, Kasidit follows one strict rule: Only deliver food. He avoids passengers because accidents carry catastrophic liability. "If a passenger dies, I could owe 100,000 THB (~US\$ 3075). From where I would get that kind of money?" Food, by contrast, feels safer. "If it's damaged, it will set me back maybe fifty or sixty THB (~US\$ 1.54-1.85). That I can handle." He also refuses parcel deliveries because they are often heavy but pay the same flat fare. By selectively choosing orders, Kasidit actively minimises risk in a system where fares are fixed but dangers aren't.

Yet no matter how carefully he plans, risk has a way of finding him. Kasidit admits that the greatest challenge is not distance or traffic, but the fragility of the goods he carries. Among all items, cakes are his arch nemesis. He laughs half in frustration:

I hate cakes. Every time I see one, I think, 'Here we go again.' The box is square; the cake is round—it's bound to slide!

Even a single pothole (of which there are plenty in Bangkok) can ruin it. Once, he earned just 38 THB for a 7 km cake delivery; but if the cake had been damaged, he would have to pay 300 THB (~US\$ 9.23) to replace it. Repeated mishaps include cakes that toppled during traffic jams, icing smeared from bumps, and boxes that opened mid-ride. One mistake, and your whole day's income is gone. Some riders, Kasidit knows, have even been suspended from the app after cake incidents.

If cakes are his worst nightmare, drinks come second. "Some drinks spill just by holding them," he jokes. When customers complain, he reports that the platform usually sides with them, even if poor packaging causes the problem. Bulk orders like twenty cups of tea from a popular chain pose the

greatest challenge. “The bike shakes, cups crack, everything leaks.” A 30–40 THB (~US\$ 1) fare of goods worth more than a thousand Baht highlights the absurd imbalance between responsibility and reward.

Then there are the “bad jobs”: bottled water, eggs, or anything bulky. “Heavy or light, it’s still 30 THB (~US\$ 1),” he says. Once, he tried hauling three packs of bottled water. “How can I even fit that? It moved around the whole ride!” Now, he refuses such orders, conserving his energy for smaller ones that at least don’t threaten his body or balance.

But the challenges riders face isn’t just physical, they’re temporal. Time itself becomes another trap, a hidden form of precarity that shapes both earnings and stress. Food that must be cooked to order forces the driver to stand around idly while the clock ticks. Popular drink chains exacerbate this issue because customers often order ten or twenty drinks at once. Every minute waiting cuts into his earning potential. Shops tucked deep inside malls or university campuses add what he calls “spatial friction.” Long walks, sore eyes, and mounting frustration. And when customers

don’t answer their phones? He’s left standing in the heat or rain, sweat dripping as the clock eats into his day. “They don’t pick up,” he says, “and I’m drenched in sweat.”

Humour becomes his shield to survive the absurdity. Behind the jokes, though, lies a quiet critique of a system that shifts risk onto workers while selling them the dream of flexibility. The platform treats every delivery the same, whether it’s one cup of coffee or twenty, one kilometre or seven. In the end it is the riders who absorb the costs of fragile items, poor packaging, lost time, and unpredictable customer behaviour.

These experiences reveal a truth about platform work that it is less about freedom and more about constant risk calculation. Every choice to accept or reject an order is a gamble. Delivery riders like him have become informal risk analysts who are constantly weighing damage, delays, or liability against potential reward, while navigating traffic and weather. The platform promises independence, but the difference between a good day and a ruined one can be a single pothole and a 38 THB (~US\$ 1) cake delivery gone wrong.



The Human Labour Behind Platform Efficiency

Delivery platforms present themselves as digital intermediaries between customers, restaurants, and riders. This claim underpins riders' status as independent partners and shapes operations. Our interviews suggest that when problems arise, riders, as the only human intermediary, absorb most of the burden. Riders experience this burden through negative customer interactions, which are often shaped by factors outside their control, from platform algorithms to restaurant performance, but have significant impacts on their work and livelihoods.

When asked about work challenges, a key complaint from riders is negative customer interactions. These range from customers complaining about slow delivery, customers putting in a wrong location, to customers letting riders wait or even abandoning an order without paying. One rider recounted: "One customer asked me to wait for them to take a shower before picking up the order." Additionally, customers often blame riders for any inconvenience they experience. As riders explained, they are often the only human contact for customers, standing in between them and the platform or restaurants.

Despite bearing the brunt of customer dissatisfaction, riders often have no control over many factors impacting customer experience. For instance, a key feature of many food delivery apps in Thailand is batch orders, in which one rider picks up multiple orders to deliver them to different customers. Through this system, platforms aim to increase efficiency and

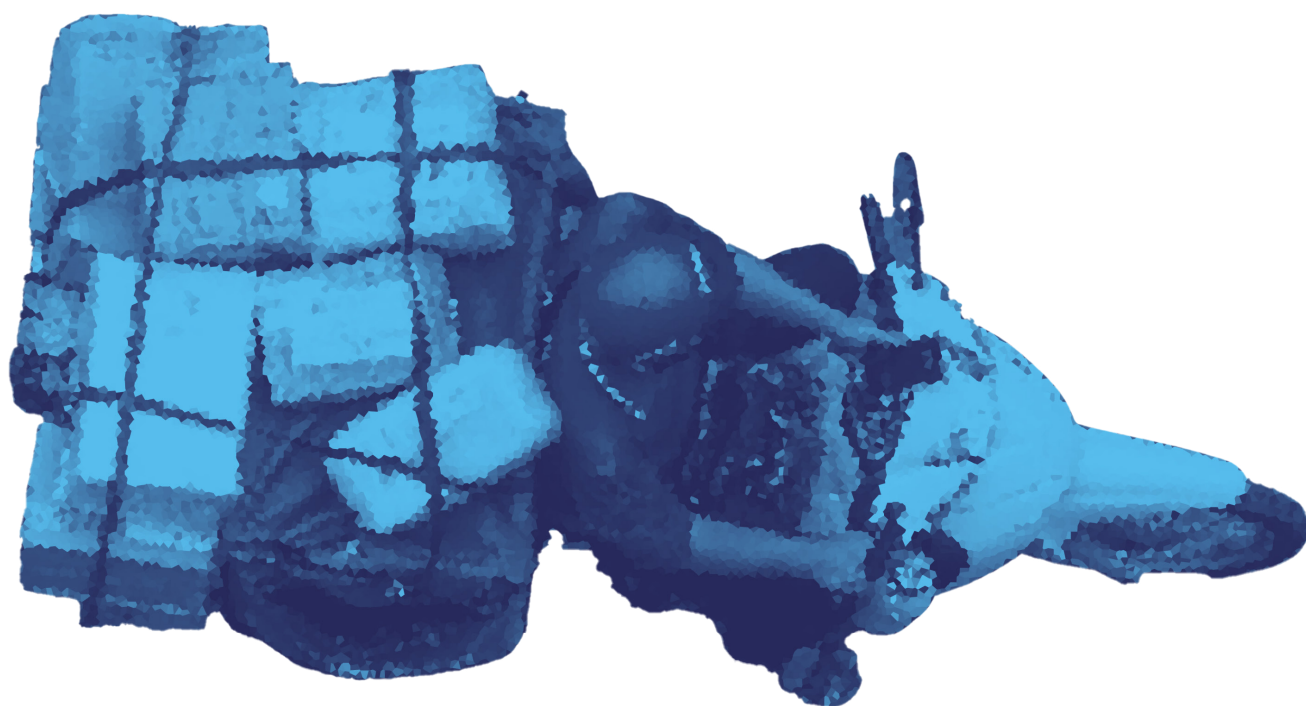
decrease labour costs, as each additional order is paid less than the first order. However, in practice, it often leads to inefficient routes for riders and long waiting times for customers. Another important factor determining customer experience is restaurants. Many riders told us that food preparation time can be the bottleneck in speedy deliveries. A key complaint is that restaurants prioritise dine-in customers during busy hours. Bad packaging or wrong or missing food items are another common issue.

Customer dissatisfaction can have serious implications for riders' work and livelihoods. A key performance metric of riders are customer ratings, which influence job assignment and can lead to deactivation if they fall below a certain threshold. Paired with little choice in which orders to accept, as a low acceptance rate also leads to temporary bans or other punishments, this puts riders at the mercy of customers. As one rider put it: "Customers are God".

The platform does not ease this burden for riders, but in fact relies on them for customer relations. While many platforms have complaint mechanisms to appeal bad ratings or punishments, often these are impractical and are not experienced as meaningful by riders. For instance, in the case of a customer abandoning an order without having paid, some riders told us they prefer to just keep the food and pay for it by themselves as the complaint process can take hours, during which they often cannot keep working. Instead of supporting riders solving issues with customers,

many platforms focus on including manners and other customer interaction guidelines in trainings and codes of conduct. Often these include grooming standards and requirements to use branded equipment, at the rider's cost. One rider recounts: "Much of the initial training focuses on manners and how to behave with customers, not about safety or how the app works".

Overall, these experiences show that despite platforms' rhetoric of digital technology as intermediary, it is humans who make the delivery ecosystem work. Platform design puts workers in a position where they are forced to smooth over any problems occurring, or risk being penalised. As one rider summarises: "The customer comes first, restaurants second, and riders come last."



MOVING FORWARD

Pathways of Change

While this is the first annual round of Fairwork ratings in Thailand, we see four pathways to change (Figure 2). First, Fairwork's theory of change relies on a humanist belief in the power of empathy and knowledge. If they have the economic means to choose, many consumers will be discerning about the platform services they use. Our yearly ratings give consumers the ability to choose the highest scoring platform operating in a sector, thus contributing to pressure on platforms to improve their working conditions and their scores. In this way, we leverage consumer solidarity with workers' allies in the fight for fairer working conditions. Beyond individual consumer choices, our scores can help inform the procurement, investment and partnership policies of large organisations. They can serve as a reference for institutions and companies who want to ensure they are supporting fair labour practices.

Our second and most direct pathway to improving working conditions in digital labour platforms is by engaging directly with platforms operating in Thailand.

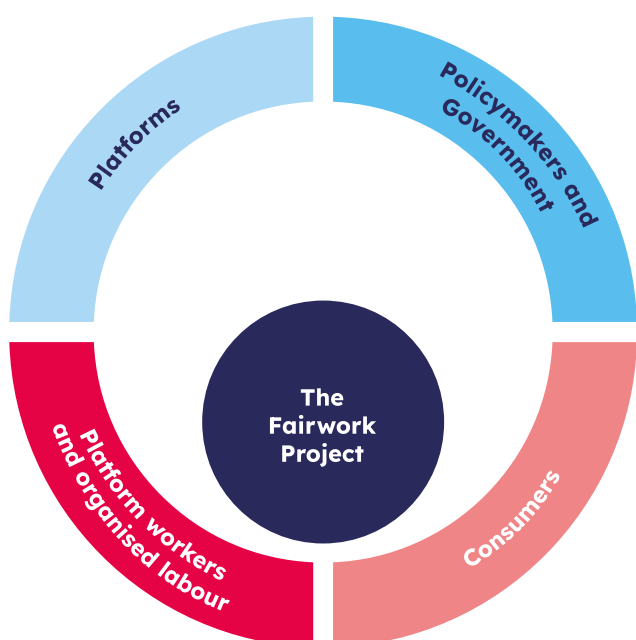


Figure 2: Fairwork's Pathways to Change

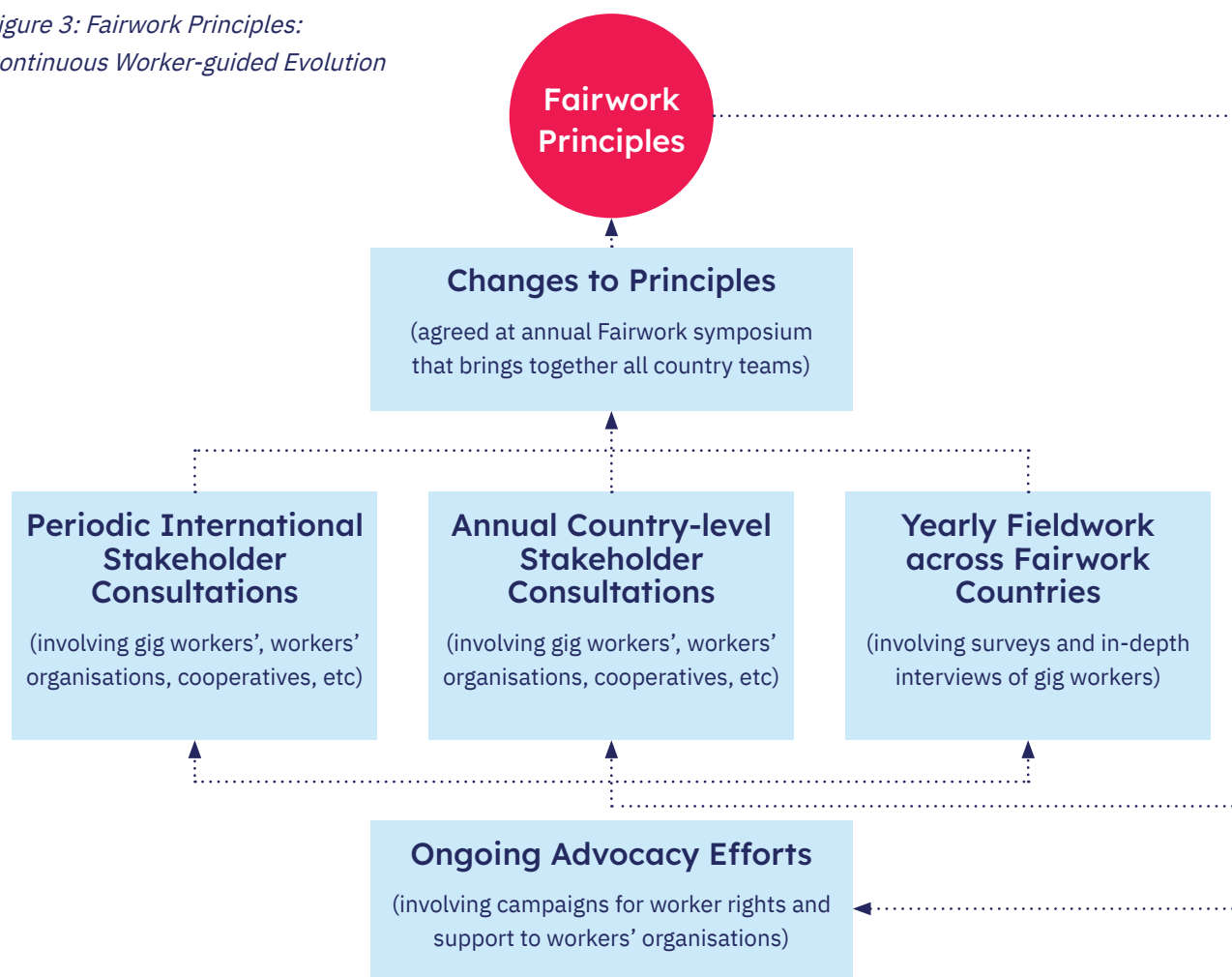
Through this scoring we engaged with inDrive and ShopeeFood. We met with both inDrive and ShopeeFood to explain the scoring. However, only inDrive provided additional evidence regarding its communications and grievance mechanisms which resulted in them earning an additional point for Fair Management. A representative of inDrive also participated in a panel discussion with Fairwork team members, government officials, academia, and workers during the report launch, demonstrating the contribution of the Fairwork project towards improving communication between stakeholders.

The third pathway of change is through engagement with policy makers and government to advocate for extending appropriate legal protection to all platform workers, irrespective of their legal classification. With the Independent Worker Protection Act in draft stage, there is room for engagement with policy makers to push for the protection of platform workers. In previous years, Fairwork principles have already been introduced through work with the labour committee of the parliament. The openness of parliamentary groups to these principles suggests that further engagement with policy makers to improve the working conditions of platform workers is possible. Through its global scope, Fairwork provides the perfect vehicle for this engagement as it opens pathways for learning from best practices in other countries.

Finally, and most importantly, workers and their organisations are at the core of Fairwork's model. Firstly, our principles have been developed and are continually refined in close consultation with workers and their representatives (Figure 3). Our fieldwork data, combined with feedback from workshops and consultations involving workers, informs how we systematically evolve the Fairwork principles to remain in line with their needs. In Thailand, we have been in close contact with different forms of worker

Fairwork's Principles: Continuous Worker-guided Evolution

Figure 3: Fairwork Principles:
Continuous Worker-guided Evolution



organisations, namely the Freedom Rider Union³⁹ and the Thai Rider Association.⁴⁰ These include several events and workshops in Thailand and one workshop in Malaysia to create connections with platform workers across the region. Through engagement with these groups, it has become clear that different workers have different opinions about the direction platform work should take. While some embrace the freedom of independent partners others push for the recognition of platform workers as employees.⁴¹ However, most workers are united in their call for better working conditions and fairer pay. Engaging these groups through the Fairwork project could provide support in bridging the gap between their goals and thus facilitate all workers to express their collective voice and their efforts to improve working conditions in the platform economy in Thailand.

There is nothing inevitable about poor working conditions in the platform economy. Despite their claims to the contrary, platforms have substantial control over the nature of the jobs that they mediate. Workers who find their jobs through platforms are ultimately workers, and there is no basis for denying them the key rights and protections that their counterparts in the formal sector have long enjoyed. Our scores show that the platform economy, as we know it today, already takes many forms, with some platforms displaying greater concern for workers' needs than others. This means that we do not accept low pay, poor conditions, inequity, and a lack of agency and voice as the norm. We hope that our work – by highlighting the contours of today's platform economy – paints a picture of what it could become.

The Fairwork Pledge

As part of this process of change, we have introduced the Fairwork pledge. This pledge leverages the power of organisations' procurement, investment, and partnership policies to support fairer platform work. Organisations like universities, schools, businesses, and charities who make use of platform labour can make a difference by supporting the best labour practices, guided by our five principles of fair work. Organisations who sign the pledge get to display our badge on company organisational materials.

The pledge constitutes two levels. This first is as an official Fairwork Supporter, which entails publicly demonstrating support for fairer platform work, and making resources available to staff and members to help them in deciding which platforms to engage with. A second level of the pledge entails organisations committing to concrete and meaningful changes in their own practices as official Fairwork Partners, for example by committing to using better-rated platforms where there is a choice.

**More information on the
Pledge, and how to sign up,
is available at**

fair.work/pledge



Fairwork Scoring System

Which companies are covered by the Fairwork principles?

The ILO defines a “digital labour platform” as an enterprise that mediates and facilitates “labour exchange between different users, such as businesses, workers and consumers”.⁴² That includes digital labour “marketplaces” where “businesses set up the tasks and requirements and the platforms match these to a global pool of workers who can complete the tasks within the specified time”.⁴³ Marketplaces that do not facilitate labour exchanges - for example, Airbnb (which matches owners of accommodation with those seeking to rent short term accommodation) and eBay (which matches buyers and sellers of goods) are obviously excluded from the definition. The ILO’s definition of “digital labour platform” is widely accepted and includes many different business models.⁴⁴

Fairwork’s research covers digital labour platforms that fall within this definition that aim to connect individual service providers with consumers of the service through the platform interface. Fairwork’s research does not cover platforms that mediate offers of employment between individuals and employers (whether on a long-term or on a temporary basis).

Fairwork distinguishes between two types of these platforms. The first, is ‘geographically tethered’ platforms where the work is required to be done in a particular location such as delivering food from a restaurant to an apartment, driving a person from one part of town to another or cleaning. These are often referred to as ‘gig work platforms’. The second is ‘cloudwork’ platforms where the work can, in theory, be performed from any location via the internet.

The thresholds for meeting each principle are different for location-based and cloudwork platforms because location-based work platforms can be benchmarked against local market factors, risks/harms, and regulations that apply in that country, whereas cloudwork platforms cannot because (by their nature) the work can be performed from anywhere and so different market factors, risks/harms, and regulations apply depending on where the work is performed.

The platforms covered by Fairwork’s research have different business, revenue and governance models including employment-based, subcontractor, commission-based, franchise, piece-rate, shift-based, subscription models. Some of those models involve the platforms making direct payments to workers (including through sub-contractors).

How does the scoring system work?

The five Principles of Fairwork were developed through an extensive literature review of published research on job quality, stakeholder meetings at UNCTAD and the ILO in Geneva (involving platform operators, policymakers, trade unions, and academics), and in-country meetings with local stakeholders.

Each Fairwork Principle is divided into two points. Accordingly, for each Principle, the scoring system allows the first to be awarded corresponding to the first threshold, and an additional second point to be awarded corresponding to the second threshold (see Table 1). The second point under each Principle can

only be awarded if the first point for that Principle has been awarded. The thresholds specify the evidence required for a platform to receive a given point. Where no verifiable evidence is available that meets a given threshold, the platform is not awarded that point.

A platform can therefore receive a maximum Fairwork score of 10 points. Fairwork scores are updated on a yearly basis; the scores presented in this report were derived from data pertaining to the seven months between March 2025 and October 2025, and are valid until October 2026.

Principle	First Point	Second Point	Total
 Fair Pay	1 Ensures workers earn at least the local minimum wage after costs	1 Ensures workers earn at least a local living wage after costs	2
 Fair Conditions	1 Mitigates task-specific risks	1 Ensures safe working conditions and a safety net	2
 Fair Contracts	1 Provides clear and transparent terms and conditions	1 Ensures that no unfair contract terms are imposed	2
 Fair Management	1 Provides due process for decisions affecting workers	1 Provides equity in the management process	2
 Fair Representation	1 Assures freedom of association and the expression of worker voice	1 Supports democratic governance	2
Maximum possible Fairwork Score			10

Principle 1: Fair Pay

1.1 - Ensures workers earn at least the local minimum wage after costs (one point)

Platform workers often have substantial work-related costs to cover, such as transport between jobs, supplies, or fuel, insurance, and maintenance on a vehicle.⁴⁵ Workers' costs sometimes mean their take-home earnings may fall below the local minimum wage.⁴⁶ Workers also absorb the costs of extra time commitment, when they spend time waiting or travelling between jobs, or other unpaid activities necessary for their work, such as mandatory training, which are also considered active hours.⁴⁷ To achieve this point platforms must ensure that work-related costs do not push workers below local minimum wage.

The platform takes appropriate steps to ensure both of the following:

1. Payment must be on time and in-full.
2. Workers earn at least the local minimum wage, or the wage set by collective sectoral agreement (whichever is higher) in the place where they work, in their active hours, after costs.⁴⁸

1.2 - Ensures workers earn at least a local living wage after costs (one additional point)

In some places, the minimum wage is not enough to allow workers to afford a basic but decent standard of living. To achieve this point platforms must ensure that work-related costs do not push workers below local living wage. The platform takes appropriate steps to ensure the following:

1. Workers earn at least a local living wage, or the wage set by collective sectoral agreement (whichever is higher) in the place where they work, in their active hours, after costs.^{49 50}

Principle 2: Fair Conditions

2.1 - Mitigates task-specific risks (one point)

Platform workers may encounter a number of risks in the course of their work, including accidents and injuries, harmful materials, and crime and violence. To achieve this point platforms must show that they are aware of these risks and take basic steps to mitigate them.

The platform must satisfy the following:

Adequate equipment and training are provided to protect workers' health and safety from task-specific risks.⁵¹ These should be implemented at no additional cost to the worker.

The platform mitigates the risks of lone working by providing adequate support and designing processes with occupational safety and health in mind.

Platforms take meaningful steps to ensure that workers do not suffer significant costs as a result of accident, injury or disease resulting from work.

2.2 - Ensures safe working conditions and a safety net (one additional point)

Platform workers are vulnerable to the possibility of abruptly losing their income as the result of unexpected or external circumstances, such as, for example, sickness, or parenthood. Most countries provide a social safety net to ensure workers don't experience sudden poverty due to circumstances outside their control. However, platform workers usually don't qualify for protections such as sick pay, because of their independent contractor status. In recognition of the fact that most workers are dependent on income they earn from platform work, platforms should ensure that workers are compensated for loss of income due to inability to work. In addition, platforms must minimise the risk of sickness and injury even when all the basic steps have been taken.

The platform must satisfy ALL of the following:

Platform takes meaningful steps towards the social protection of its workers.

Where workers are unable to work for an extended period due to unexpected circumstances, their standing on the platform is not negatively impacted.

The platform implements policies or practices that protect workers' safety from task-specific risks. In particular, the platform should ensure that pay is not structured in a way that incentivizes workers to take excessive levels of risk.

Principle 3: Fair Contracts

3.1 - Provides clear and transparent terms and conditions (one point)

The terms and conditions governing platform work are not always clear and accessible to workers.⁵³

To achieve this point, the platform must demonstrate that workers are able to understand, agree to, and access the conditions of their work at all times and that they have legal recourse if the other party breaches those conditions.

The platform must satisfy ALL of the following:

The party contracting with the worker must be identified in the contract, and subject to the law of the country/state/region in which the worker works.

The contract/terms & conditions are presented in full in clear and comprehensible language that all workers could be expected to understand.

Workers have to sign a contract and/or give informed consent to terms of conditions upon signing up for the platform.

The contracts/terms and conditions are easily accessible to workers in paper form, or via the app/platform interface at all times.

Contracts/terms & conditions do not include clauses that revert prevailing legal frameworks in the respective countries.

Platforms take adequate, responsible and ethical data protection and management measures, laid out in a documented policy.⁵⁴

3.2 - Ensures that no unfair contract terms are imposed (one additional point)

In some cases, especially under 'independent contractor' classifications, workers carry a disproportionate amount of risk for engaging in a contract with the service user. They may be liable for any damage arising in the course of their work, and they may be prevented by unfair clauses from seeking legal redress for grievances. To achieve this point, platforms must demonstrate that risks and liability of engaging in the work is shared between parties.

Regardless of how the contractual status of the worker is classified, the platform must satisfy ALL of the following:

Every worker is notified of proposed changes in clear and understandable language within a reasonable timeframe before changes come into effect; and the changes should not reverse existing accrued benefits and reasonable expectations on which workers have relied.

The contract/terms and conditions neither include clauses which exclude liability for negligence nor unreasonably exempt the platform from liability for working conditions. The platform takes appropriate steps to ensure that the contract does not include clauses which prevent workers from effectively seeking redress for grievances which arise from the working relationship.

In case platform labour is mediated by subcontractors: The platform implements a reliable mechanism to monitor and ensure that the subcontractor is living up to the standards expected from the platform itself regarding working conditions.

In cases where algorithms are used to determine pricing, bonuses, ratings and/or allocate jobs, the data collected, and calculations used must be transparent and documented in a form available to workers in clear and comprehensible language that all workers could be expected to understand.

Principle 4: Fair Management

4.1 - Provides due process for decisions affecting workers (one point)

Platform workers can experience arbitrary deactivation; being barred from accessing the platform without explanation, and potentially losing their income. Workers may be subject to other penalties or disciplinary decisions without the ability to contact the service user or the platform to challenge or appeal them if they believe they are unfair. To achieve this point, platforms must demonstrate an avenue for workers to meaningfully appeal disciplinary actions.

The platform must satisfy ALL of the following:

There is an easily accessible channel for workers to communicate with a human representative of the platform and to effectively solve problems. This channel is documented in the contract and available on the platform interface. Platforms should respond to workers within a reasonable timeframe.

There is a process for workers to meaningfully and effectively appeal low ratings, non-payment, payment issues, deactivations, and other penalties and disciplinary actions. This process is documented in a contract and available on the platform interface.

In the case of deactivations, the appeals process must be available to workers who no longer have access to the platform.

Workers are not disadvantaged for voicing concerns or appealing disciplinary actions.

4.2 - Provides equity in the management process (one additional point)

The majority of platforms do not actively discriminate against particular groups of workers. However, they may inadvertently exacerbate already existing inequalities in their design and management. For example, there is a lot of gender segregation between different types of platform work. To achieve this point, platforms must show not only that they have policies against discrimination, but also that they seek to remove barriers for disadvantaged groups and promote inclusion.

Platforms must satisfy ALL of the following:

The platform has an effective anti-discrimination policy laying out a clear process for reporting, correcting and penalising discrimination of workers on the platform on grounds such as race, social origin, caste, ethnicity, nationality, gender, sex, gender identity and expression, sexual orientation, disability, religion or belief, age or any other status.⁵⁵

The platform has measures in place to promote diversity, equality and inclusion on the platform. It takes practical measures to promote equality of opportunity for workers from disadvantaged groups,

including reasonable accommodation for pregnancy, disability, and religion or belief.

Where persons from a disadvantaged group (such as women) are significantly under-represented among a pool of workers, it seeks to identify and remove barriers to access by persons from that group.

If algorithms are used to determine access to work or remuneration or the type of work and pay scales available to workers seeking to use the platform, these are transparent and do not result in inequitable outcomes for workers from historically or currently disadvantaged groups.

It has mechanisms to reduce the risk of users discriminating against workers from disadvantaged groups in accessing and carrying out work.

Principle 5: Fair Representation

5.1 - Assures freedom of association and the expression of worker voice (one point)

Freedom of association is a fundamental right for all workers, and enshrined in the constitution of the International Labour Organisation, and the Universal Declaration of Human Rights. The right for workers to organise, collectively express their wishes – and importantly – be listened to, is an important prerequisite for fair working conditions. However, rates of organisation amongst platform workers remain low. To achieve this point, platforms must ensure that the conditions are in place to encourage the expression of collective worker voice.

Platforms must satisfy ALL of the following:

There is a documented mechanism⁵⁶ for the expression of collective worker voice that allows ALL workers, regardless of employment status, to participate without risks.

There is a formal, written statement of willingness to recognise, and bargain with, a collective, independent body of workers or trade union, that is clearly communicated to all workers, and available on the platform interface.

Freedom of association is not inhibited, and workers are not disadvantaged in any way for communicating their concerns, wishes and demands to the platform, or expressing willingness to form independent collective bodies of representation.

5.2 - Supports democratic governance (one additional point)

While rates of organisation remain low, platform workers' associations are emerging in many sectors and countries. We are also seeing a growing number of cooperative worker-owned platforms. To realise fair representation, workers must have a say in the conditions of their work. This could be through a democratically governed cooperative model, a formally recognised union, or the ability to undertake collective bargaining with the platform.

The platform must satisfy at least ONE of the following:

Workers play a meaningful role in governing it.

In a written document available at all times on the platform interface, the platform publicly and formally recognises an independent collective body of workers, an elected works council, or trade union. This recognition is not exclusive and, when the legal framework allows, the platform should recognise any significant collective body seeking representation.



APPENDIX II

Comments from Companies Rated

Prior to publication, all companies rated were given an opportunity to review this report and provide a comment. Below are all of the responses we received from the companies. The quotes have been edited for brevity.

inDrive

During the scoring process one rider reported difficulties in communication with operators from inDrive contributing it to their perceived non-native Thai language levels. The research team requested evidence from inDrive regarding the location of their service operators. inDrive responded to the request providing details for the process of contacting and engaging with service operators as well as confirming that there are seven Thai operators responsible for dealing with Thai platform workers.

Additionally, a representative of inDrive participated in the launch event of the Fairwork report. Below are his remarks paraphrased and translated remarks:

The speaker opened with remarking that inDrive aims to operating a business in a way that promotes greater fairness for workers. In this light, inDrive welcomes the Fairwork Thailand report because it serves as a reflection of the platform's operations and highlights details that inDrive in Thailand may have overlooked, which the company intends to use for adjustment and improvement.

The speaker further elaborates that inDrive operates in 48 countries and was founded on the principle of justice and Fair Work. This concept is

the foundation of the company. inDrive aims to provide transparency regarding the work of platform workers (riders) concerning both the choice of jobs and their income. The platform structure is designed to give riders the right to choose their work, allowing them to select their own jobs and determine their own earnings.

Furthermore, inDrive globally participates in discussions and consultations to help develop policies and improve working conditions for platform workers in the platform economy. Despite their status as a small player in the Thai ecosystem, the speaker emphasizes their strong desire to participate in and help develop the local ecosystem.

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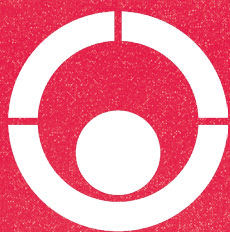
ENDNOTES

1. For this scoring the minimum wage rate in Bangkok was used as only platform workers in Bangkok where interviewed. For minimum wage rates in Thailand see: Ministry of Labour (2020) New Minimum Wage Rate Table, Ministry of Labour. Available at: <https://www.mol.go.th/en/minimum-wage> (Accessed: 25 October 2025).
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45. Work-related costs include direct costs the worker may incur in performing the job. This may include, for instance, transport in between jobs, supplies, vehicle repair and maintenance, fuel, road tolls and vehicle insurance. However, it does not include transport to and from the job (unless in-between tasks) nor taxes, social security contributions or health insurance.
46. The ILO defines minimum wage as the "minimum amount of remuneration that an employer is required to pay wage earners for the work performed during a given period, which cannot be reduced by collective agreement or an individual contract." Minimum wage laws protect workers from unduly low pay and help them attain a minimum standard of living. The ILO's Minimum Wage Fixing Convention, 1970 C135 sets the conditions and requirements of establishing minimum wages and calls upon all ratifying countries to act in accordance. Minimum wage laws exist in more than 90 per cent of the ILO member states.
47. In addition to direct working hours where workers are completing tasks, workers also spend time performing unpaid activities necessary for their work, such as waiting for delivery orders at restaurants and travelling between jobs and undertaking mandatory training (i.e., training activities that must be completed for workers to continue accessing work on the platform). These indirect working hours are also considered part of active hours as workers are giving this time to the platform. Thus, 'active hours' are defined as including both direct and indirect working hours.
48. In order to evidence this, where the platform is responsible for paying workers the platform must either: (a) have a documented policy that ensures the workers receive at least the local minimum wage after costs in their active hours; or (b) provide summary statistics of transaction and cost.
49. Where a living wage does not exist, Fairwork will use the Global Living Wage Coalition's Anker Methodology to estimate one.
50. In order to evidence this, where the platform is responsible for paying workers the platform must either: (a) have a documented policy that ensures the workers receive at least the local living wage after costs in their active hours; or (b) provide summary statistics of transaction and cost data evidencing all workers earn a minimum wage after costs.
51. The ILO recognises health and safety at work as a fundamental right. Where the platform directly engages the worker, the starting point is the ILO's Occupational Safety and Health Convention, 1981 (C155). This stipulates that employers shall be required "so far as is reasonably practicable, the workplaces, machinery, equipment and processes under their control are safe and without risk to health", and that "where necessary, adequate protective clothing and protective equipment [should be provided] to prevent, so far as is reasonably practicable, risk of accidents or of adverse effects on health."
52. The ILO's Social Security (Minimum Standards) Convention, 1952 (No. 102), establishes nine classes of benefit (medical care and benefits in respect of sickness, unemployment, old age, employment injury, family, maternity, invalidity and survivors). Source: <https://webapps.ilo.org/public/english/revue/download/pdf/ghai.pdf>, p.122.
53. The ILO's Maritime Labour Convention, 2006 (MLC 2006), Reg. 2.1, and the Domestic Workers Convention, 2011 (C189), Articles 7 and 15, serve as helpful guiding examples of adequate provisions in workers' terms and conditions, as well as worker access to those terms and conditions.
54. As stated in international standards, ethical data protection includes aspects such as legitimacy and lawfulness, proportionality, purpose limitation, transparency, quality, data subject's rights (access, rectification, evaluation, erasure, and portability), accountability, and collective rights. Also, when using AI, the rights to be informed about it and to have a human interface.
55. In accordance with the ILO Convention No. 111 concerning Discrimination in Respect of Employment and Occupation and applicable national law.
56. A mechanism for the expression of collective worker voice will allow workers to participate in the setting of agendas so as to be able to table issues that most concern them. This mechanism can be in physical or virtual form (e.g. online meetings) and should involve meaningful interaction (e.g. not surveys). It should also allow for ALL workers to participate in regular meetings with the management.



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