

SPECIAL FEATURE

Digital Platform Employment in Kazakhstan: Can New Technologies Solve Old Problems in the Labor Market?

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Abstract

Recent years have witnessed an upsurge of interest in the “sharing,” “gig,” or “on-demand” economy, which has been changing the relationships between customers, workers, and companies. While literature on the gig economy in the Western context abounds, few studies have focused on “digitalized” labor relations in the Central Asian context.

Drawing on qualitative field research in Kazakhstan in 2016 and 2021, supplemented by quantitative data, this article contributes to debates about labor relations and the digitalized “gig” economy in a non-Western context. It provides a novel, in-depth, multisource account of the structure of platform-based business and work experiences in the digitally enabled Kazakh gig economy. Using ethnographic evidence, we offer a detailed analysis of labor conditions from the perspective of platform-based companies and gig workers, identifying resistance and “survival” strategies used to navigate and even challenge the existing system characterized by “algorithmic management” or “algorithm-based” labor relations.

Introduction¹

An unprecedented wave of protests has broken out across Kazakhstan in the last few years. If in 2019 and 2020, the country saw 234 and 508 protests, respectively, this number hit a record 548 protests in the first half of 2021. Issues of inequality, labor, and welfare were at the heart of 375 protests that took place between 2018–2021.²

While labor protests were usually organized by workers in traditional industries such as oil and gas and/or metallurgy, in recent years, Kazakhstan saw a series of protests by couriers and taxi drivers.³

Considering the growing demand for better living and working conditions, the need to create more decent jobs has become more urgent than ever. In response to a worsening labor market, those in power concluded that new technologies and the digitalization of labor would become a panacea for Kazakhstan. It was officially announced that platform employment was supposed to become a means to both good income and professional development.⁴

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Following global trends, Kazakhstan witnessed an upsurge of interest in the gig economy (also known as the sharing economy or on demand economy), which uses online platforms to digitally connect on-call workers with customers.⁵ Gig working arrangements include “crowd work” and “work on demand apps” or “app work,” in which the demand for and supply of working activities are matched online.⁶

Many scholarly works examine what the implications of the gig economy mean for labor relations. Some welcome “gig working arrangements,” emphasizing the autonomy and flexibility afforded to workers.⁷ It has been argued that people prefer flexible, independent contract work to standard employment, which enables them to move from gig to gig and utilize technology to sell their labor.

However, others claim the changes introduced by gig economy companies (i.e., tech disruptors) have not necessarily been positive due to the erosion of employment standards and labor regulations.⁸ Studies have indicated that the gig economy creates more short-term jobs, often with low commitment between “independent contractors” and organizations.⁹ Workers have become increasingly disposable,¹⁰ which is reflected in the high levels of labor turnover in these sectors.¹¹ Problems with employment rights, limited career prospects, and job insecurity have led to a resurgence of debates about job quality in developed countries.¹²

While these thought-provoking contributions cover different aspects of gig work relations and provide important insight into gig-based working arrangements, relevant literature is primarily situated within the context of high-income countries in the Global North.¹³ These studies consider this type of work arrangements (zero-hour contracts, on-call labor) “a part of a much vaster trend towards the casualization of labor”¹⁴ or within the context of the Global South.¹⁵

To date, very few studies focus on “digitalized” labor relations in post-Communist countries in Central Asia, which is particularly puzzling for several reasons.

First, in contrast to other developing economies in the Global South, Central Asian countries had to transition from a centrally planned economy to a market-based one after the collapse of the Soviet Union. There were two key features of Soviet labor relations: 1) the existence of three main actors: the state, the trade union, and the head of an enterprise, and 2) strictly hierarchical relationships among these entities as they were under the party’s control. Furthermore, the main concern used to be “whether there was a sufficient labor supply in the country.” Currently, the main concern is “how much unemployment there is and what it might be in the future.”¹⁶ In addition, during this transition, workers had to adapt to “the requirements, norms and practices of the emerging new market system and cope with specific capitalist problems that were rather unknown, such as unemployment, poverty, increasing stratification, as well as self-responsibility for one’s own life and planning for the future.”¹⁷

Second, even though the technology stimulating the gig economy is a new phenomenon,¹⁸ the casualization and informalization of the workforce in the region are not. In fact, income insecurity, odd working hours, and a lack of legal protection have long been a Central Asian reality. Thus, the nature of gig work is not well understood in developing countries of Central Asia, where a significant part of the economy has consisted of nonstandard forms of employment, defined as “fixed-term contracts and other forms of temporary work, temporary agency work and other contractual

arrangements involving multiple parties, disguised employment relationships, dependent self-employment, and part-time work,”¹⁹ for years.

Thus, this study seeks to fill this gap. Kazakhstan presents a particularly interesting case for several reasons. Kazakhstan is an upper-middle-income country whose economic growth has mainly been tied to the oil and gas sector.²⁰ The country aspires to become one of the top developed countries by 2050. At the same time, the informal sector represents a much larger share of employment in Kazakhstan than in developed countries.²¹

According to official data, 13 percent of the total working population was engaged in informal employment in 2022.²² However, the actual numbers might, in fact, be much higher since informal markets and trade that are part of the informal economy do not appear in national statistics. As Fehlings and Karrar²³ put it, “not only is it difficult to quantify informal markets and trade [in Central Asia], but even agreeing on how many outlets there are or how many people work in a particular market is often difficult.”

Self-employment is also common and involves activities such as selling goods and services, driving taxis, babysitting, and providing building and construction services. Most of these activities go undocumented and are often characterized by a high level of insecurity, poor working conditions, and low income. Since these forms of employment are not part of a formal employment relationship, workers do not benefit from the protections offered by labor laws, including minimum wage rates, social security coverage, and paid sick leave. Officially, an estimated 24 percent of the total workforce in Kazakhstan was self-employed in 2022.²⁴

The question of how many people are employed in the gig economy remains open.²⁵ In the absence of accurate data, experts operate with varying rough estimates. The Ministry of Labor and Social Protection,²⁶ for instance, cites experts and states that platform employment covers approximately 500,000 people, while the Kazakh International Bureau for Human Rights and Rule of Law²⁷ suggests 1.5 million people are employed in the gig economy. Despite incomplete data, however, it is obvious that we are referencing a substantially large segment of the labor market in the process of formation, which requires special attention.²⁸

Methodology

Drawing upon qualitative field research in Kazakhstan conducted in 2016 and 2021 and supplemented by quantitative data, this article contributes to the debate concerning the digitalized gig economy. It provides a novel, in-depth, multisource account of the structure of platform-based business and work experience in the digitally enabled gig economy in Kazakhstan.

The respondents were recruited by sending announcements to the communities of couriers on Telegram and through “snowball” sampling. The couriers were from Almaty and Astana and included both men and women. The age composition of the study participants is very divergent—the youngest informant is nineteen years old, and the oldest informant is fifty-one years old. The interviews were conducted in the Russian and Kazakh languages. The recorded interviews were transcribed. The average interview length was fifty minutes.

Using ethnographic evidence, we offer a detailed analysis of labor conditions from the perspective of platform-based companies and gig workers, identifying resistance and “survival” strategies that are being used to navigate and even challenge the existing system, which is characterized by algorithmic management or algorithm-based labor relations. The focus of this paper is “work on demand” that involves “real-world” tasks (e.g., delivery services). The research also analyzes the discourse of key governmental initiatives in the sphere of labor relations to identify the stance of the Kazakh government on gig economy phenomena.

The Context

The labor market in Kazakhstan has undergone significant changes. Since the beginning of the 2000s, the number of people employed in the economy has grown from 6.2 to 9 million. This is primarily due to demographic changes. Over the past twenty years, the population has increased from 14.9 to 19.5 million people. An additional factor in the growth of employment numbers has been economic growth, which contributed to the creation of new jobs and the expansion of employment opportunities.²⁹

In the context of the current topic, there is special significance to the dramatic shift in the employment structure. Under the influence of structural economic changes, there has been a significant reduction in the employment of Kazakhstanis in the traditional employment sectors such as agriculture. Thus, from 2000 to 2022, the share of those employed in agriculture decreased from 31 percent to 12.4 percent, or from 1.9 million to 1.1 million people.³⁰

At the same time, employment has increased in the service sector, such as education, finance, and insurance activities, as well as other services. As of 2022, 68 percent of the workforce, or 6 million people, were employed in the service sector.

The exodus of people from agriculture to the service sector is part of a broader process of migration and urbanization in Kazakhstan. Since 2000, the number of urban residents in the country has increased from 8.4 to 11.9 million. However, city economies could not absorb the flow of internal migrants. Given weak industrialization and low rates of economic diversification, informal or shadow employment grew. Thus, according to official statistics, in 2010, 37 percent of the workforce was informally employed.³¹ In 2015, this share decreased to 24 percent but remained significant with approximately two million people. Informal employment was mainly through informal agreements, i.e., people hired by a legal entity without a formal contract, which represents a socially unprotected category of workers deprived of labor guarantees and social benefits.³²

This means that a significant part of the workforce included socially vulnerable workers. Obtaining a state-sanctioned status as unemployed in Kazakhstan is also a bureaucratically complicated procedure.³³

To solve employment problems, the government of Kazakhstan has implemented several state programs. In 2011, a large-scale employment program was adopted with the main tasks “to involve the self-employed, the unemployed, and people from the target population groups in productive employment.”³⁴ Two years later, the government introduced a new initiative for 2013–2016, which provided for the expansion of

employment assistance to citizens through training programs, youth internships, and the issuance of microcredits to start a business. According to the results of these two state programs, approximately 450 billion tenge were spent, and 680,000 people participated. In 2017, the government adopted an even more extensive initiative “Enbek” for the period between 2017 and 2021.

Despite such efforts, the effectiveness of these state support measures for socially vulnerable citizens remains unclear.³⁵ The government’s focus has consistently been on keeping the unemployment rate within 5 percent through the employment of citizens in infrastructure projects, as well as training and retraining programs. However, until 2020, platform employment was off the government’s radar, although the media widely discussed the impact of technological development and digitalization on the labor market.

The Gig Game in Kazakhstan

Interest in platform employment in Kazakhstan has skyrocketed following protests by couriers in Almaty in 2021. Several dozen workers came out to a rally demanding the abolition of the new payroll system and improved working conditions. These protests immediately attracted the attention of local and central authorities since, in Kazakhstan, the state perceives any mass protest as requiring intervention and oversight.

One of the main consequences of the spread of the internet and digitalization was the entry of foreign companies into the Kazakhstani market, offering taxi and delivery services through digital platforms. In a very short time, these companies have joined the leading employers in Kazakhstan.

Platform companies in Kazakhstan occupy different segments of the services market, including transportation services and couriers. Two leading giants represent the former: Yandex. Taxi and InDriver.

Yandex. Taxi is an online taxi service provided by the Russian company Yandex, which began operations in Kazakhstan in 2016. Since its inception, Yandex. Taxi has expanded significantly and provides services in almost all cities in the country, including some small towns. Now, the company has nearly monopolized the entire taxi market, ousting its competitors (Uber) and almost destroying the private cab market. Yandex does not disclose information on how many drivers it has in Kazakhstan, but in 2022, their figures increased by 27 percent for drivers and 41 percent for customers.³⁶

A competing Russia-based taxi service, InDriver, has existed in Kazakhstan since 2017. However, unlike Yandex, InDriver offers an alternative bidding model in which passengers can offer their price for a trip, and drivers can accept or reject this price. In Kazakhstan, the InDriver app has been downloaded over ten million times. The service is available in several major cities in Kazakhstan.

Both taxi platforms primarily use taxi companies and do not hire drivers directly, which frees them from social and labor obligations and responsibility for labor safety in accordance with the law. Instead, platforms present themselves as information services or order aggregators. The official registration of relations between drivers and platform operators usually occurs online based on a user agreement (public offer).

The second category of platforms is the *courier delivery of groceries, food, and goods*. Although there are many such companies, the market in Kazakhstan is basically divided among four large brands: the Kazakh “Chocofood,” Spanish “Glovo,”³⁷ Finnish “Wolt,”³⁸ and Russian “YandexFood.”

Chocofood is a Kazakh startup founded in 2013 that offers its services in eleven cities in Kazakhstan. The business model is similar to that of its competitors. When Chocofood entered the market, it was a niche with no domestic competition.

Initially, Chocofood was only a marketplace, and all orders were processed manually. The first mobile application appeared in 2015. A year later, the company began seeking partners, and in 2017, it reached out to couriers. The same year, Chocofood merged with its main competitor, Foodpanda. Chocofood managed to retain its competitor’s team, and several months later, it launched its own delivery service as a combined team.³⁹

By monopolizing the market, digital platforms have been able to set their own rules for workers. Food aggregators enter into a civil agreement with their couriers that sets out the base compensation rates and bonus system. Couriers must have their own transport, bear the burden of maintenance, and supply their own fuel costs, while taxes are borne independently. This remuneration scheme does not include payments for sick leave or vacation. Such work arrangements replicate those of large taxi aggregators in Kazakhstan.

Push and Pull Factors of Gig Employment

Companies offering platform employment appeared in Kazakhstan at approximately the same time and have quickly become significant players in the labor market. While the number of people employed in this area cannot be accounted for by official statistics, even an approximate figure of 500,000 people indicates that a significant number of Kazakhstani citizens work through platform employment. Users of platform employment are predominantly young men (nine out of ten digital platform workers). More specifically, the share of men on taxi platforms is 98 percent, the share of women is 2 percent, and the average age of employees ranges between twenty-five and forty-four years old. The average platform courier is also a young man, with 90 percent of contract laborers being men aged eighteen to thirty.⁴⁰

The involvement of workers in platform employment is due to complex reasons related to both the structural problems of the Kazakhstani economy (push factors) and the benefits of working in the gig economy (pull factors).

The main push factor is the *mismatch between supply and demand in the labor market*. In Kazakhstan, the number of graduates of higher and secondary specialized educational institutions is growing every year, but the economy cannot offer enough jobs. According to the National Chamber of Entrepreneurs, the number of specialists with higher education is 5.3 times higher than the real need for these specialists.⁴¹ As a result, on average, more than 70,000 university graduates remain unemployed every year. This problem is exacerbated by the low quality of education at higher educational institutions, where students do not receive the skills and competencies necessary for the labor market. As a result, 40.1 percent of employed graduates work outside their specialty, and 23 percent of young people with experience in higher

education work in low-skilled jobs.⁴² Based on interviews conducted for this study, gig workers attribute their employment on platforms to a lack of experience and a low level of qualifications obtained from universities.

“The problem for our youth stems from the fact that they are given theoretical knowledge in their universities...they do not have any work experience ... the employers need a well-prepared expert who is going to start working right away.”⁴³

Interestingly, platform employment contrasts with respondents’ accounts of “normal” work, which refers to employment in the formal sector with fixed hours. Furthermore, the couriers perceive employment in the gig economy as a forced step for those who could not find a job even with a university diploma.

This view suggests that people turn to gig work for survival due to the lack of job opportunities in the formal economy. Respondents from both Astana and Almaty shared similar accounts, although the younger respondents (eighteen to twenty-five) specifically stressed that their lack of work experience and low-quality education were the main problems in finding employment. They reported that it was the most difficult to find a job at large corporations that offer above-average wages and good social packages (e.g., insurance). Moreover, another response indicates that “desirable” jobs may already be occupied, and although young people can secure those jobs in theory, in practice their chances are slim:

“Those positions [well-paid jobs at big corporations] are already taken by people who have been working there for years, by people who will work there until their retirement.”⁴⁴

Another structural problem for young professionals who do not have sufficient qualifications and work experience is *corruption*. The acute imbalance between supply and demand creates a bottleneck for access to formal employment. Almost all respondents reported that despite being well educated, it is almost impossible to get a job at a large company or government service without having acquaintances or offering bribes.

“And here, in Kazakhstan, it is very difficult to get a job without ‘Sake, Make’. Recently, I met a courier. It turns out he graduated from the University with honors. Now, he works as a courier because there is no other work.”⁴⁵

Thus, lacking connections and the financial ability to pay a bribe, a significant number of young people are pushed into the informal market.

“They all are asking for a bribe in exchange for hiring you. Even if they don’t do it directly, they give you a hint.”

“I agree [that having connections help you get a job]. First, [companies] are looking at your work experience. Then, those candidates who don’t have any use their connections to get a job.”

“Those who have connections are the first ones to get a job. Those with money are next.”⁴⁶

Young people, as one of the most vulnerable groups, are therefore excluded based on numerous factors, which makes it hard for them to obtain formal employment. Such flaws within economic and political institutions, which manifest in the lack of transparency and accountability, contribute to further marginalization of already excluded populations, specifically, those from low-income families.

The next push factor is *poor management and the lack of career advancement opportunities*. Some respondents stated they would sometimes opt out of signing a contract in the absence of any alternatives, simply due to dissatisfaction with the lack of transparency and growth opportunities, among other reasons:

“You could say that the employer himself doesn’t let you make your money...As time passes, people get tired and they start demanding things from their employer like a raise or something...but the [employer replies] with ‘Then, resign. Others will come to fill your place’ ...[There is] internal corruption. They steal a lot of money. Finally, I simply resigned from my position at that firm without having another job lined up.”⁴⁷

What makes these experiences stand out is that a raise is expected in return for putting more effort into one’s work. Employers’ failure to meet these expectations, as well as their limited or nonexistent recognition of workers’ hard work, ultimately prompt people to quit their jobs.

In a way, resigning is a form of protest against an unfair system (or at least a system that is perceived to be unfair by workers). Although more data is needed to support this argument, it seems reasonable to assume that similar motivations could drive (or at least contribute to) people’s decisions to enter the gig economy. If workers are already willing to forgo a stable, albeit unsatisfactory, income in exchange for the instability associated with temporary unemployment or even the absence of any income at all, they are even more likely to do so when there is a better gig work alternative.

Indeed, interviews showed that employment in the gig economy can be attractive for several reasons. First, such employment brings a relatively *good profit*. According to the respondents, by working as couriers, they can earn much more than they could as young professionals. This is especially true for fresh university graduates without work experience, who can only qualify for the minimum wage.

Despite that fact that most couriers work with tech companies as individual entrepreneurs, not employees, most respondents were happy with how much they earned as couriers.

“I manage to earn approximately 25 000 tenge per day (= \$58). On average, I make 600 000 tenge per month (\$1400). For that, I have to work 10–12 hours a day.”⁴⁸

A significant portion of the interviewees mentioned that in large cities, such as Almaty and Astana, a family can survive on \$1,000 per month, but living relatively

comfortably would require an income of approximately 600,000–700 000 tenge (\$1,400–\$1,700). Notably, in 2021, the average monthly wage in Kazakhstan was 250,000 tenge (\$585).

As reported by interviewees, salaries in various industries, even those that have enough openings, still fail to attract young labor market entrants:

“[I have graduated from a university] here...I have the necessary knowledge [that is required for the job]. I even completed an internship. But when I was informed of my salary, I didn’t want to go there”.⁴⁹

Second, the gig economy is attractive due to its *flexible schedule and the ability to be independent*. Many couriers commented that they liked that they could plan their own day. They can start work at 9 a.m., hit their daily income goal, and call it a day.

Most respondents mentioned that “being their own boss,” controlling their schedule, and flexibility are some of the most valuable benefits of their position. Some respondents noted they can control their income and, as a result, their own future, as “you do not depend on anyone” and “you don’t need to obey anyone.”

Our data also suggests that the decision to do gig work may not necessarily follow an implicit cost-benefit analysis.

As mentioned above, the significant imbalance between supply and demand in the formal market ensures a large influx of workers into platform employment, which is not considered as prestigious as working at big corporations or in public service but makes it possible to earn relatively good money. Thus, a distinctive feature of platform employment in Kazakhstan is the wide representation of people with higher education.

“We, couriers and taxi drivers, are thought to be people without higher education. Some think that couriers are former criminals who have no other options. This is what many people think.”⁵⁰

In this context, one can claim there is a phenomenon of “educated” couriers in Kazakhstan who, despite having a degree that could lead to high-skilled occupations, are forced to work as couriers and taxi drivers due to the low wages in the formal labor market.

The Other Side of the Gig Story

The rapid growth of platform employment in Kazakhstan has had a positive effect on the formalization of the labor market. People came out of the “shadow” and began to earn money through platforms (e.g., taxi services). This made it possible to improve the quality of service, increase the level of transportation safety, and streamline the relationship between taxi drivers and customers. Additionally, the positive role of platforms was seen in employment rates during the pandemic. According to the founders of Naimi.kz—a platform offering self-employed professionals-for-hire for the home and the office—more than 130,000 people had the opportunity to earn income via the platform in 2020.

However, as the market grew, the negative aspects of platform employment began to appear. The imperfection of algorithms, the gap between workers' expectations and the benefits offered by companies, and the lack of proper regulation by the government have led to confrontations between platforms and their workers. In recent years, the number of courier protests has increased. The 2021 Wolt-couriers strike became one of the largest nonunion actions of nonprimary sector workers in Kazakhstan over the past ten years. Courier strikes took place in Almaty on May 12 (fifty people), July 7 (eighty people), and October 21 (twelve people appealed to the authorities). The drivers of "Yandex Go" attended protest actions on December 6 (four hundred people) in Shymkent and March 31 in Almaty (video message).⁵¹

The principal confrontation between platforms and their employees lies in *the wage system*, which is primarily automated and predetermined by the companies. Although the cost of services can vary significantly depending on the operator, there are still standard features, including a certain percentage fee paid to the operator. In addition, platforms set special rates for service providers, based on such factors as demand, distance, type of transport, travel time, and traffic conditions. Thus, the final cost of a service depends on the above factors and the commission rate of the platform itself.

For example, in Kazakhstan, Yandex. Taxi drivers and Chocofood couriers receive a fixed commission from the operator and a surcharge from the taxi company they work with. Payment is made directly to the drivers after the order is completed. As for Glovo, couriers' earnings are formed as follows: a consistent basic income, additional payments for the distance covered, and accrued bonuses. In this case, the size of bonuses may change periodically, for example, due to unfavorable weather conditions. Thus, a flexible system of cooperation between the courier and the platform has become possible. Couriers can independently choose their "plan" type, schedule their workdays and hours on the platform along with the territory they will cover for order fulfillment, and connect and disconnect from the application at any time. These factors directly affect their level of income. For example, on average, a Glovo courier can receive 260,000 to 300,000 tenge (around \$600) for 8–10 hours of work a day for 20–22 days a month.

However, the algorithms used for calculating wages are not transparent and are incomprehensible to the employees. On top of that, these systems can be changed unilaterally by the platforms. Therefore, in 2021, Glovo employees put forward a twenty-three-point list of demands, including the requirement to introduce basic pay, change the bonus system for working in bad weather, improve the ordering system, and determine delivery limits. The inability to negotiate contracts with the platform's representatives eventually became the cause of protests from couriers. The outlined difficulties were a part of larger systemic problems resulting from the blurred labor status of platform workers. Platforms position themselves as "intermediaries," providing only the technical infrastructure for a transaction between clients and customers. Thus, they relieve themselves of traditional employer responsibilities that provide workers with social guarantees. As Chocofood's spokesperson points out, their relationship with employees does not fit in with traditional employer-employee relationships.

“We do not have employee–employer relationships. Our relationships are not even close to labor relations. Therefore, it is much safer for the company to work with individual entrepreneurs.... We are simply a marketplace that connects the customer who orders food, the people who prepare the food, and the people who deliver the food.”⁵²

However, platforms have a tremendous amount of control over tariff formation and wages through algorithms and tracking tools that keep count of the number of deliveries/trips, monitor location through GPS, control quality with photos, and require a rating system. The company can unilaterally block employees or lower their ratings if violations are detected. In other words, self-employed contract workers often cannot set the price for their services based on demand, seasonality, weather, and costs.

As noted by the companies, it is beneficial for them to conclude contracts with employees as individual entrepreneurs. According to Kazakhstan’s legislation, such contracts do not imply any social guarantees and are subject to minimal taxes. These companies offer no social or benefit packages. Couriers are individual entrepreneurs that provide a service and receive payments in return. Individual entrepreneurs pay taxes in accordance with the law, and companies help them register as individual entrepreneurs.

Platforms prefer such arrangements to traditional civil law contracts, which require payments to a pension savings fund (10 percent), income tax (10 percent), and compulsory health insurance premiums (2 percent). Under such an agreement, companies must pay an additional 22 percent of taxes for employees, which is not beneficial for them. Therefore, platforms tend to justify the desire to work with individual entrepreneurs by pointing out that the latter must pay taxes to the country’s economy, while keeping silent about the fact that they are shifting their own responsibilities to the employees.

“We understand that in this business, we are talking about big money. Therefore, couriers need to comply with the laws of the country and pay taxes. There are many couriers who do not want to register as individual entrepreneurs and pay taxes. We cannot work with such couriers.”⁵³

Moreover, to manage employees, companies also employ widely used tools, such as key performance indicators (KPIs). For courier work, the platform work model is based on the implementation of KPIs. Some companies pay for every hundred meters traveled by the courier, and some pay for every five hundred meters or every kilometer. Chocofood, for example, pays for every 100 meters and pays more if the courier arrives at the restaurant and to the client on time. There is a basic rate just for completing an order.

Another critical issue is flexible employment conditions when employees decide when and how much they work. On the part of employees, this aspect of employment is assessed as an unconditional benefit, as it allows them to manage their workload independently. However, it is evident that in an attempt to earn more, service

providers try to complete as many orders as possible. As explained by the couriers, in such work, the cost of most orders varies according to the time of day.⁵⁴

According to the study, while most couriers see this work as a side job, more than half of the respondents in our study work at least ten hours per day. In some cases, couriers work more than twelve hours, affecting their health and well-being. In the case of taxi drivers, for instance, *overwork* leads to fatigue and loss of focus, which means increased risks for both the driver and the customers.

In addition, the algorithms are designed so that employees cannot refuse an order in some cases, as this affects their *ratings*. Companies evaluate couriers, and this process is automatic. Soon, Chocofood plans to introduce a new system for rating couriers. When an order is placed, the algorithm sends the order to a courier, and the courier may choose to accept the order or not. However, it is in companies' interests that the courier accepts the order as it affects the timeliness of delivery.

In addition, couriers are said to be soon evaluated based on their politeness and how they treat clients. However, our interviews showed imbalances in relationships between clients and service providers. Many couriers point out that all clients are different: some are nice and friendly, while others are arrogant, rude, or even abusive. Since many couriers have previous work experience in other sectors, many note that they have already gone through the "school of life" and are not surprised by such rude customer behavior.

Many couriers have noted that a significant disadvantage of mobile apps is that the assessment is carried out unilaterally. The client can give a negative assessment to the courier, but the courier cannot give one in return. There are times when clients indicate the wrong address, do not open the door, and do not answer the phone. In such cases, the courier must wait half an hour until the customer picks up the order, which naturally affects the courier's earnings. As explained by the representative of Chocofood:

"Many clients who are actually located outside of the delivery zone placethe delivery point inside the zone. And when the courier arrives the client says, 'Hey, actually, I'm 10 blocks down the street, bring it here, I'll pay you extra'. There is no reason for a courier to do that, and such clients call us and complain."⁵⁵

Moreover, an additional stakeholder that should be considered are restaurants. On this matter, the Chocofood CEO said:

"I often work as a courier myself. And often, I see, say, a disdainful attitude from the administration and restaurant employees toward couriers. The fact that I have a backpack does not mean that you can treat me like less than a human...Many restaurants make couriers wait inside the restaurant longer than promised. Couriers lose money that way."⁵⁶

Thus, the new system to be introduced by Chocofood will allow couriers to rate the restaurants. Restaurants' overall ratings will be summed from the ratings given

by the clients and couriers. Restaurants with poor ratings will not be shown at the top of the client-facing menu.

The next aspect of platform employment that causes dissatisfaction among workers is the *weak sense of belonging* to the company and the *lack of direct communication* between workers and platform managers. According to the respondents working for Wolt, they saw company representatives for the first time during recent protests. Many couriers noted that it would be nice if companies could organize team-building or group activities.

“It’s just that sometimes you feel that you are not working with people, but with an application. You are like a robot. It would be nice to meet other team members, at least those who work with us – the technical support.”⁵⁷

Some platforms understand this problem. According to Chocofood, to retain couriers, the company tried to experiment not only with money but also with extracurricular activities, for example, paying for football games and giving school supplies to couriers’ children. However, they concluded that couriers do not care about these extra perks: what is the most important for the couriers is who pays the most.

“We did everything in our power to challenge the status quo, that is, somewhere we may pay less, but we treat [the couriers] this way. We want to build a longer-term relationship, but we kind of conducted several experiments and we failed. So now, we understand that it is not important for the couriers. [...] You just need to pay them more.”⁵⁸

The “Invisible Hand” of the Market or Government Regulation?

The protests of the couriers exposed systemic problems that have accumulated in the relationship between platforms and their employees. The main demands of the strikers are the revision of wages, improvement in the ordering system, solving the problems with geomaps, legal protection and compensation in the case of various incidents, social protection, insurance, payment by the company for medical expenses, and several other requirements.

The reaction to the protests from some companies was not constructive. For example, Wolt representatives blocked or suspended most active protesters. Glovo was also unwilling to meet the demands of its couriers, resolving only a small number of complaints made by their workers.⁵⁹

Local companies are taking a more open approach based on their long-term interests. According to a Chocofood representative, the couriers’ demands were satisfied by mutually beneficial changes. However, the Wolt representative commented:

“Yes, we work within the framework of civil law contracts, but each courier has insurance. We help our partners in organizational matters and in the fulfillment of their tax obligations. We agree that companies can take more action to protect our courier-partners. In Kazakhstan, for example, we conduct an absolutely transparent partnership – we pay social and pension contributions for each courier [...] We also provide insurance against accidents during working hours.”

As interviews show, some incentive for companies to build constructive relationships with employees is competition in the labor market. Since there are several competing companies on the market, there are several relevant factors couriers consider when deciding which company to join. One courier described their decision process as follows:

“I had to choose between [working for] Glovo or Wolt. Eventually, I decided to work for Wolt. Glovo offers customers an option to pay in cash... Wolt has a more convenient application.”⁶⁰

To recruit more couriers, companies launched reward incentive programs. Some companies spend a great amount of money recruiting couriers. Couriers are paid ten thousand tenge for each friend they recruit to become a courier for the company. Some companies do various promotions. For example, couriers can receive bonuses based on the total number of deliveries they complete. This is primarily done to recruit more couriers. Each company uses different strategies, as the Chocofood representative noted.

“Our main limitation at Chocofood today is the lack of couriers. We do not have time to recruit them [...] This is not a fight with competitors, but with ourselves. Now, we are completely focused on the service – to deliver one hundred percent of orders on time, cover as wide a delivery area as possible, reduce the cost of delivery (ideally to zero), and help restaurants earn more with Chocofood.kz.”⁶¹

However, a more significant factor that forces companies to revise their terms of payment and labor is the organized protection of courier interests. The strike started by Wolt couriers continued with Glovo and Chocofood couriers, who announced that they intend to create the Association of Couriers of Kazakhstan to protect their interests. Through bilateral negotiations with the above-mentioned companies, the conflict was settled. Later, it was revealed that Wolt did not change working conditions for its long-term partners, and Chocofood made concessions, increasing bonuses for speedily delivered orders. An interview participant made the following observation:

“I think the company leadership chose the wrong tactics. This year’s protests are not the first. Last year, there were also protests, but they were not that widely covered by the media... If you want to change something, let’s discuss it. They think that couriers have no power, but couriers do.... Only after the protests this year, they began to look for ways to solve the problem, to relieve tension in the society.”⁶²

In general, courier strikes can be considered as a request for self-organization by workers in the gig economy and the formation of understanding of their own interests, which they can defend together. Interestingly, in this dispute, the state took the side of the couriers, (gently) forcing employers to make concessions. It is significant that in 2021, President Tokayev noted “this area needs state assistance in terms of social and medical insurance, pensions, taxation.”⁶³

However, it is too early to discuss the formation of a labor community. Interviews showed that strikes are generally considered to be a radical way of solving problems and should be seen as the last resort.

“I do not support those who protested. Why? Because having a constructive dialogue is important to me. While they were protesting, it was very difficult for us to work. We, as couriers, let the company down that day, let down our customers, plus the company’s rating is falling. If the company’s rating goes down, there will be fewer orders. And it will impact our earnings.”⁶⁴

The presence of such attitude toward protests and protesters is an indicator of disunity among platform workers and the weakness of their professional solidarity

As mentioned above, pressure from the government served as another incentive for increasing traffic onto the platforms. Due to the risk of reputational losses and pressure from the authorities, companies were forced to make partial concessions.⁶⁵ For example, in the case of the protests in Almaty, local authorities became active participants in the negotiation process actively discussing the problems of platform employment and attempting to introduce regulatory measures. It became clear that platform employment in Kazakhstan lacks proper and effective state regulation. In addition, there was no suitable conceptual apparatus based on which it would be possible to resolve labor disputes and build legal relations between the platforms and their employees. On top of that, it became necessary to introduce the definition of the status of platform workers and the payment of taxes for their social, medical, and pension security.

To regulate platform employment in Kazakhstan, special rules have been included in the Social Code, which came into force on July 1, 2023. This code introduces several innovations that establish requirements for registering and operating as platform workers. Therefore, from January 1, 2025, taxi drivers using internet platforms, must notify local authorities about the implementation of such activities. Additionally, all taxi drivers will be included in a special registry of taxi carriers. Violation of these requirements would lead to administrative fines for the individuals.

However, according to experts, the Social Code did not meet the expectations for regulating platform employment in the interests of the workers. According to Muslim Khasenov, a lawyer in the field of labor relations, “their state has effectively excluded platform workers from labor law. They were assigned to the civil law category ‘executor’—an individual or individual entrepreneur registered on an internet platform, providing services to customers, or performing work using an internet platform based on a public contract. Furthermore, the relationship between the internet platform operator and the contractor is regulated in accordance with the Civil Code of the Republic of Kazakhstan. Therefore, now they will not be able to create their own trade union—there is no worker status here.” Thus, the state did not endow platform workers with the status of a party to labor relations, leaving such an opportunity at the mercy of internet platforms. According to the expert, this indicates that the relevant state body represented by the Ministry of Labor and Social Protection is lobbying for the interests of platform companies.

Thus, the protests of couriers in Kazakhstan have revealed the vulnerability of platform workers, their lack of fixed labor status, as well as insufficient social guarantees, and insecurity of labor rights. The study showed that platform employment is a good alternative to shadow employment and low-paid work in the public sector with the current imbalance in the labor market. Comparatively high pay and flexible working conditions become decisive factors when choosing platform employment.

However, this position in the labor market is used by platform companies to their advantage. They conclude contracts on favorable terms for themselves, which excludes the possibility of workers defending their rights and demanding better working conditions. Although aware of platform workers' problems, government agencies prefer to take a *laissez-faire* position, appealing to the idea of a "free" market. However, this solution moves away from the problem and leaves room for platform companies to lobby for their own interests, even though they have much greater negotiating capabilities and resources to negotiate favorable conditions for themselves under current conditions.

Conclusion

The labor market in Kazakhstan has been undergoing massive changes. Firstly, while fewer people are employed in the traditional sectors in Kazakhstan, the employment in the services sector continues its upward trend. In recent years, more people have been turning to the gig economy. The estimates for the number of Kazakhstanis who are pursuing independent, short-term work and making their living in the gig economy, span a wide range (500,000–1.5 million people).

Secondly, digitalization and the rapid growth of platform employment in Kazakhstan has had a positive effect on the formalization of the labor market. People came out of the "shadow" and began earning a living through digital platforms. Analysis revealed that the involvement of workers in platform employment is due to complex reasons related to both structural problems of the Kazakhstani economy: 1) push factors (e.g., mismatch between supply and demand in the labor market, corruption, poor management, and the lack of career advancement opportunities), and 2) pull factors, i.e., the benefits of working in the gig economy (e.g., flexible schedule, the ability to be independent, relatively good profit). For many, working as a gig worker has become a remedy to problems in the labor market.

However, as the market grew, the negative aspects of platform employment began to appear. The imperfection of algorithms, the gap between workers' expectations and the benefits offered by companies, and the lack of proper regulation by the government have led to confrontations between platforms and their workers. The gig economy companies shirk their legal obligations by replacing stable positions with short-term contracts and temporary employment. Labor relations are increasingly based on the exploitation of gig workers.

Finally, the official discourse adopted by the government predominantly highlights the benefits for gig workers. However, this should be seen as an attempt to legitimize further flexibilization of the labor market based on fictitious freedoms. In reality, governmental policies lock gig workers into low-skilled and low-paid jobs while reaping the benefits that gig work can provide for a range of contemporary national problems.

Notes

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