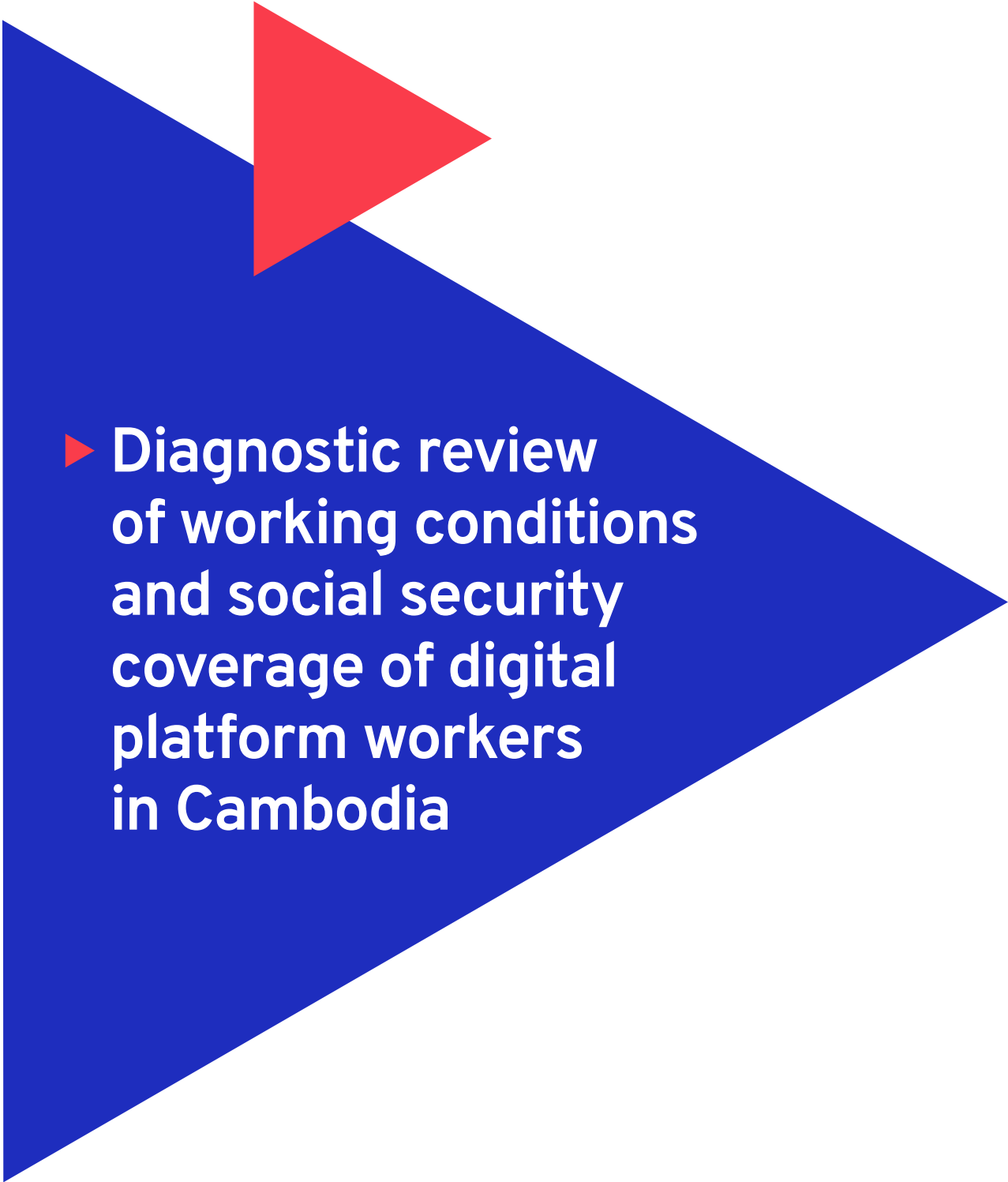




International
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Organization



► Diagnostic review of working conditions and social security coverage of digital platform workers in Cambodia

- 
- ▶ **Diagnostic review
of working conditions
and social security
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platform workers
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Contents

► Acknowledgements	iv
► Contents	v
► Executive summary	vii
► Abbreviations	viii
► 1. Introduction	1
1.1. Background	1
1.1.1. Overview of platform work in Cambodia	1
1.1.2. Key sector developments and Cambodia's regulatory landscape	2
1.2. Research objective	4
► 2. Methodology	5
2.1. Platforms included in the research	5
2.2. Data collection methods	6
2.2.1. Survey with workers	6
2.2.2. In-depth interviews	8
2.2.3. Key informant interviews	8
2.3. Research limitations	8
► 3. Findings	10
3.1. Basic characteristics of platform workers	10
3.1.1. Demographic profile	10
3.1.2. Years of working as a platform worker	12
3.1.3. Type of platform	12
3.2. Challenges and opportunities of platform work in Cambodia	13
3.2.1. Accessing platform work	13
3.2.2. Working conditions	18
3.2.3. Platform earnings and associated expenses	19
3.3. Use of automated systems	24
3.3.1. Task assignment and work organization	24
3.3.2. Ratings and penalties	25
3.3.3. Account suspension	26
3.4. Occupational safety and health	27
3.5. Trade unionization	29
3.6. Dispute resolution mechanisms	30
3.7. Social security	32
3.8. Perceptions on the future of platform work	33
► 4. Conclusions	35
► References	38

► Annexes	40
Annex 1. Priorities and recommendations of the Tripartite Consultation Workshop	40
Annex 2. Survey questionnaire	42
Annex 3. In-depth interview moderator guide	58
Annex 4. Key informant interview moderator guide	62

List of tables

Table 1	Key digital labour platforms in Cambodia	2
Table 2	Distribution of survey respondents by type of service and main digital platform used (percentage)	6
Table 3	Final survey sample distribution by district in Phnom Penh and type of platform worker (number of surveyed workers)	7
Table 4	Final sample size for in-depth interviews	8
Table 5	Overview of key informant interview participants	8
Table 6	Demographic profile (percentage)	11
Table 7	Overview of payment and fee structure (percentage)	20
Table 8	Monthly expenses associated with platform work (US\$)	22

List of figures

Figure 1	Map of survey location	6
Figure 2	Number of platforms used and primary platform type	13
Figure 3	Reasons for seeking platform work and source of referral	14
Figure 4	Training received and topics covered	16
Figure 5	Multiple platform profile, average days and hours worked, and waiting time, by type of platform worker	19
Figure 6	Order cancellations and compensation for order cancellations	21
Figure 7	Average earnings and expenses by type of service	23
Figure 8	Vehicle ownership and work-related costs	24
Figure 9	Algorithmic impact on earnings and penalties	25
Figure 10	Impact of ratings on work and earnings	25
Figure 11	Penalties for refusing or cancelling orders	26
Figure 12	Account suspension	27
Figure 13	Work-related injuries and occupational safety and health facilities available	28
Figure 14	Group membership and social protection	29
Figure 15	Access to complaint and dispute resolution processes	31
Figure 16	Social security coverage	33

Executive summary

Digital labour platforms have become a significant component of Cambodia's economy, creating employment opportunities in ride-hailing and delivery services. This report provides a diagnostic analysis of working conditions and the socio-legal context of platform work in Cambodia. The exploratory findings presented in this report are based on a mixed-methods approach involving 1,237 surveys and 29 in-depth interviews with platform workers in Phnom Penh, and ten key informant interviews, including with government, platform operator and trade union/association representatives. The study covers workers on digital ride-hailing (tuk-tuk and taxi drivers) and food delivery platforms (delivery riders). The findings reveal a sector characterized by opportunity and growth, but also by significant challenges related to job security, social protection and workers' voice.

The digital platform workforce is predominantly young and male, with delivery riders being significantly younger than tuk-tuk and taxi drivers. Most workers are engaged with a single platform, particularly in delivery services, while ride-hailing drivers more commonly use multiple platforms to mitigate income instability. On average, workers work 6.7 or 6.8 days per week and 11–12 hours per day, including unpaid waiting time.¹ Earnings vary by sector: taxi drivers generate the highest gross monthly earnings (US\$581) but retain the least due to high operational costs, whereas delivery riders earn less gross monthly earnings (US\$501) but have higher earnings after deducting operational expenses. Similarly, tuk-tuk drivers had gross monthly earnings of US\$477 and slightly lower earnings after deducting operational expenses compared to delivery riders.

Approximately half of the workers surveyed reported having some form of social security benefit, with most workers having voluntary healthcare coverage under the National Social Security Fund (NSSF). Healthcare is a critical consideration for platform workers, as work-related injuries are common, especially among delivery riders, one third of whom have been injured while working.

Platform workers are mostly classified as independent contractors or “partners” by platforms, and consequently are not covered by the formal employer–employee relationship under the Cambodian Labour Law (1997), the Law on Trade Unions and the Law on Social Security Schemes (2019). This has direct consequences on social protection, labour rights protections, access to collective bargaining and trade unionization. Although platform workers organize through informal networks, trade unionization is virtually absent.

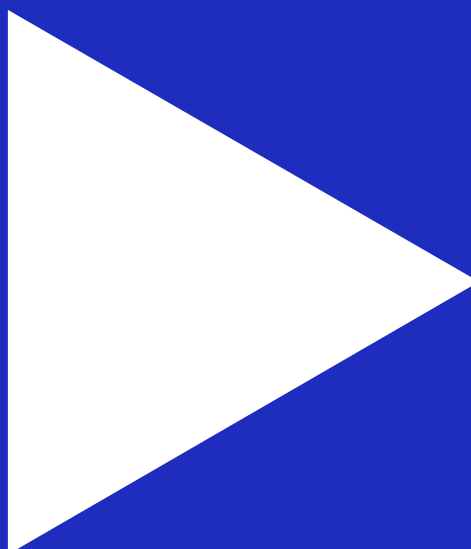
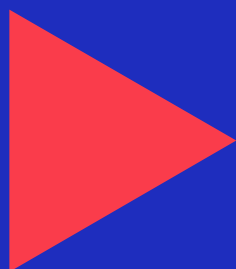
Automated systems profoundly shape working conditions. A large majority of workers report that customer ratings significantly impact their earnings and task allocation. Nearly half of the respondents reported having faced penalties, such as reduced job allocation or account suspension, for refusing or cancelling orders. Although most workers can file complaints through platform apps, resolution rates are low and serious issues like accidents receive minimal support.

Cambodia's regulatory environment has fostered platform growth and significant opportunities for workers. However, workers raised challenges concerning their future on digital platforms, particularly financial instability due to increased competition and limited power to negotiate trip fares and commission fees. Many respondents considered digital platform work as necessary in the absence of more stable alternative employment options. A clear legal framework, which, for example, appropriately clarifies the employment relationship between platform operators and platform workers, would provide greater certainty for both parties, foster sustainable growth and offer a more secure future for the digital platform economy in Cambodia.

¹ “Waiting time” refers to periods when workers are logged into the app and available for work but are not actively completing a task. This can include: (i) waiting time after accepting an order (for example, waiting at a restaurant or pickup point for the order to be ready); and (ii) gaps between tasks while waiting for the next job offer. This time is typically unpaid because earnings are primarily tied to completed jobs rather than time spent waiting.

Abbreviations

IDI	in-depth interview
ILO	International Labour Organization
ILS	international labour standard
KII	key informant interview
MISTI	Ministry of Industry, Science, Technology & Innovation
MLVT	Ministry of Labour and Vocational Training
MPWT	Ministry of Public Works and Transport
NSSF	National Social Security Fund
OECD	Organisation for Economic Co-operation and Development
OSH	occupational safety and health



A photograph of a man in a red shirt and helmet riding a red motorcycle. He is smiling and looking towards the camera. Behind him, a woman is seated in a tuk-tuk. The background shows a dirt road with other vehicles and trees. The image is partially obscured by a blue diagonal overlay.

▶ 1

Introduction

▶ 1.1. Background

Digital labour platforms have transformed the way people work and procure services. Over the past decade, widespread internet access and rapid technology advancements have helped position these platforms as mainstays of the global economy – connecting people to taxi rides and food delivery, and to freelancers providing a range of remote services. Globally, the demand for digital labour has grown significantly, with the number of digital platforms increasing from 131 in 2010 to 653 in 2023 (ILO 2026). A 2023 World Bank report estimates that digital labour through online digital platforms constituted up to 12.5 per cent of the global workforce (World Bank 2023).²

1.1.1. Overview of platform work in Cambodia

In line with these global trends, Cambodia has seen a significant expansion of its digital labour platforms, providing opportunities for many workers to supplement their incomes through app-based ride-hailing and delivery services (Chan, Siriwat and Nay 2021). Local platforms such as PassApp and E-GetS, along with international companies like Grab, have created numerous employment opportunities for Cambodian workers (Tracxn, n.d.).

² Digital labour platforms can be categorized as either “location-based platforms”, through which workers provide services locally, such as ride-hailing or food delivery, and “online web-based platforms”, which allow workers to provide services online and remotely, such as research or web development (ILO 2021).

Digital labour platforms in Cambodia primarily cover three key sectors: (i) ride-hailing and mobility services; (ii) food and grocery delivery services; and (iii) logistics and delivery services. Table 1 describes these key sectors and the major platforms operating in Cambodia.

► **Table 1. Key digital labour platforms in Cambodia**

Key sectors	Definition	Major platforms in Cambodia
Ride-hailing and mobility service	A platform that enables on-demand transportation to passengers by using automated decision-making systems to organize and/or facilitate work. ¹	PassApp Grab OTO Express TADA Move
Food and grocery delivery services	A platform that enables on-demand delivery of food or grocery by using automated decision-making systems to organize and/or facilitate work. ²	Food Panda Grab Nham24 E-GetS WowNow GOODTOGO
Logistics and delivery services	A platform that enables last-mile logistics, pickup and delivery services by using automated decision-making systems to organize and/or facilitate work. ³	OTO Express Zippy Express

Sources: ¹ Chen et al. 2023; ² Davis 2023; ³ Transportify, n.d.

While there were several local start-ups in the ride-hailing and mobility sector early on, the market is now dominated by two companies – PassApp (locally founded) and Grab (internationally founded). Cambodia has a strong prevalence of three-wheeled tuk-tuks or bajajs for ride-hailing services, with services generally utilizing fewer motorbikes or cars. The app-based food and delivery market in Cambodia is more diverse, with several local services (for example, Nham24, GOODTOGO) and international services (for example, Food Panda, WowNow, E-GetS, and Grab) operating. Most of the riders on these platforms use motorbikes (ITF 2024).

Most digital platforms are concentrated in Phnom Penh, fostered by its strong tech ecosystem, startup growth and increasing internet penetration. However, platforms are also expanding into other areas of Cambodia, increasing opportunities for workers outside the capital. PassApp has significantly broadened its reach, extending its services to cities such as Siem Reap, Battambang, Sihanoukville, Kampot, Poipet and Kampong Cham. Another local delivery platform, Nham24 (now acquired by Grab), also covers these cities. Other digital labour platforms, such as OTO Express and Zippy, serve larger cities, including Phnom Penh, Siem Reap and Sihanoukville (*Travelling Mandala* 2025).

1.1.2. Key sector developments and Cambodia's regulatory landscape

1.1.2.1. Drivers of change affecting Cambodia's platform work

Growth in Cambodia's digital platform economy has been driven by increased internet access and mobile phone usage, a large informal workforce and government investment in digital infrastructure. Cambodia's energy generation and demand have grown significantly over the past decade, and intense competition among the country's major mobile providers has reduced data prices, leading to a surge in mobile subscriptions and users (Chan, Siriwat and Nay 2021). In 2025, Cambodia had over 25 million mobile subscriptions, with a penetration rate of about 140 per cent of the population (Kemp 2025). Almost two thirds (60.7 per cent) of the population were using the internet at the beginning of 2025, with most people accessing the internet through their mobile devices (Kemp 2025; Chan, Siriwat and Nay 2021).

Cambodia also has a large informal workforce, with 88.3 per cent of total employment being in informal employment (Cambodia, Ministry of Planning (MOP), National Institute of Statistics 2019). Digital labour platforms, especially app-based ride-hailing and delivery services, provide opportunities for workers to supplement their income through these platforms, although they do not constitute formal employment. Existing research indicates that tuk-tuk and taxi drivers in Cambodia earn more through digital platforms than through traditional services.³ The Cambodian Government has made recent commitments to formalize informal workforce, including by addressing digital platform work, under its National Strategy for Informal Economy Development 2023–2028 (Government of Cambodia 2023).⁴ In December 2024, the Government introduced a digital platform for onboarding informal economy workers (ILO 2025a), providing a pathway for workers in the informal sector, including platform workers, to formalize their employment and gain access to social protections through the National Social Security Fund (NSSF) (Cambodia, NSSF 2024). Digital platform workers can register, for example, as “own-account workers” or under other eligible categories. The Government also launched a Monitoring and Evaluation Framework for the National Strategy on Informal Economy Development (NSDIE) 2023–2028. The framework, supported by a digital dashboard, establishes a national system to coordinate, track and assess implementation, thereby strengthening transparency and accountability and helping the Government tailor support for informal workers (*B2B Asia News* 2024).

1.1.2.2. Cambodia’s regulatory approach

The Cambodian Government, through policies such as the Rectangular Strategy (Phase 4) and the current Pentagonal Strategy (Phase 1), has actively supported the digital economy as a key influencer of economic growth. Additional policies, laws and initiatives, such as the Science, Technology, and Innovation (STI) Policy 2020–2030, the STI Roadmap 2030, the ICT Master Plan 2020 and the E-Commerce Strategy, establish Cambodia’s plan to build a comprehensive digital economy. These policy initiatives aim to expand infrastructure, develop ICT human capacity and create a supportive legal and educational ecosystem. Cambodia’s forthcoming National Employment Policy 2026–2035, currently in draft, will also recognize the importance of digital platform work in the expanding labour market.⁵

A supportive policy and regulatory environment has laid the groundwork for Cambodia’s technology startup sector to flourish. In 2024, there were 202 startups at various stages of development, 160 of which were tech or tech-enabled. The sector has seen significant growth in local entrepreneurship, with 53 per cent of startups in 2024 founded locally, an increase from 34 per cent in the years prior (*Cambodia Investment Review* 2025). Within this broader landscape, digital labour platforms have also grown – in 2025, there were 36 digital platforms in Cambodia, with 14 founded between 2020 and 2023 alone (Tracxn, n.d.).

The primary law governing employment relationships – the Cambodian Labour Law (1997) – predicates a traditional, binary employer–employee relationship that requires a degree of subordination and direct control that is often absent on digital platforms. As is common in other countries, most digital labour platforms in Cambodia classify workers as independent contractors or “partners”. Under this arrangement, platforms are generally not required to provide employment-related benefits such as minimum wage, social security, occupational safety and health, and paid leave.

While the Labour Law (1997) and the Law on Social Security Schemes (2019) require companies to make mandatory contributions to the NSSF for their employees, independent contractors, including many platform workers, are outside the scope of compulsory coverage. The NSSF’s voluntary health insurance scheme, implemented in 2023, allows self-employed workers to enrol voluntarily. The voluntary healthcare scheme provides healthcare, maternity and funeral grant benefits with the same package and levels as the medical scheme for mandatory members, funded by a 2.6 per cent contribution based on the minimum contributory wage (600,000 Cambodian riel). However, pension and occupational risk (work injury) coverage are separate schemes and are not included under the voluntary healthcare scheme.⁶ More recent legislation, including the Ministry of Public Works and Transport’s Prakas No. 100 (2021), regulate

³ A 2018 study with drivers in Cambodia found a 63 per cent increase in the number of trips and 46 per cent increase in monthly earnings (Phun, Masui and Yai 2018).

⁴ See also ILO 2024a.

⁵ From key informant interviews with government representatives.

⁶ As per the Law on Social Security Schemes (2019).

platform companies by requiring them to train drivers and ensure that drivers and vehicles are licenced and registered, but current legislation does not regulate employment contracts between companies and drivers/riders or ensure minimum earnings (TradeWorthy 2020; ITF 2024).⁷

► 1.2. Research objective

This diagnostic research aims to provide further insights into the characteristics of employment on digital labour platforms in Cambodia. It is envisioned that this new evidence will contribute to national dialogue and policy processes regarding work on digital labour platforms. Below are the research objectives:

- To analyse current working conditions and social protection coverage in digital labour platforms in Cambodia.
- To conduct a review of secondary information concerning the relevant socio-economic and policy and legal context in which digital labour platforms operate in Cambodia.
- To understand the views of the different stakeholders in relation to the main challenges and opportunities related to work on digital labour platforms.

⁷ It was confirmed in the KIIs that vehicles are mandated to register with the Ministry of Public Works (MPWT), but there is no minimum earning requirement.



▶ 2

Methodology

This study used a mixed-method approach, including a desk review, a survey of three types of workers on digital labour platforms, in-depth interviews with workers and key informant interviews with stakeholders.

▶ 2.1. Platforms included in the research

This report covers workers on location-based digital labour platforms providing food delivery and ride-hailing services. Research findings for workers have been analysed by the type of service, namely:

1. delivery riders;
2. tuk-tuk drivers; and
3. taxi drivers.

A total sample of 1,237 workers were surveyed, and these were distributed roughly evenly across the three platform service types, providing large enough samples for comparing results between the three service types with reasonable accuracy and a margin of error less than 5 per cent.

The surveyed workers used one or more digital platforms, and their primary platform is presented in table 2. Most are working for either PassApp (36 per cent) or Grab (34 per cent). PassApp mainly provides ride-hailing services, including tuk-tuk and taxi services, while Grab provides both ride-hailing and food delivery

services. Other significant platforms operating in Cambodia include WowNow, Food Panda and E-GetS, all food delivery services, as well as Move and TADA, both ride-hailing services.

► **Table 2. Distribution of survey respondents by type of service and main digital platform used (percentage)**

Digital platform	Type of platform worker		
	Delivery rider (n=415)	Tuk-tuk driver (n=417)	Taxi driver (n=405)
Grab	43	13	47
PassApp	2	82	23
WowNow	19	2	27
E-GetS	19	–	–
Food Panda	17	–	–
Other	<1	2	3

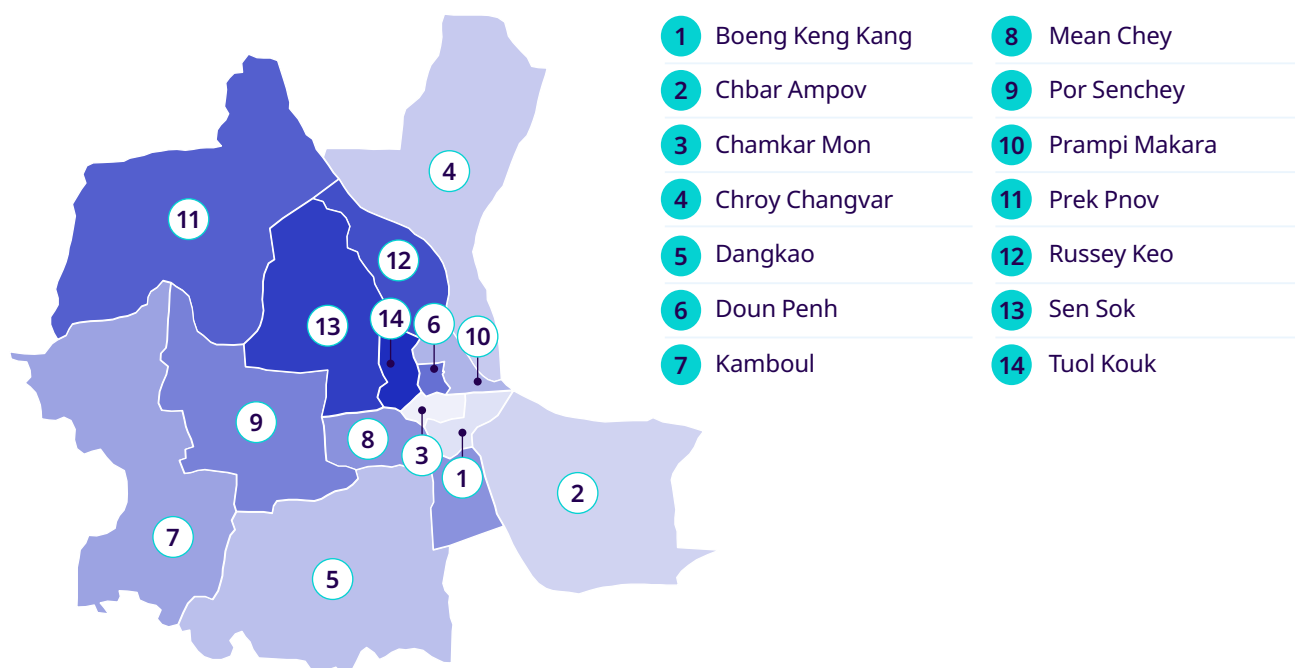
Note: – = nil.

► 2.2. Data collection methods

2.2.1. Survey with workers

The survey was conducted with digital platform workers in Cambodia's capital, Phnom Penh (figure 1). Phnom Penh is the largest economic centre in Cambodia and has the highest concentration of platform workers, including delivery riders, tuk-tuk drivers and taxi drivers. While data collection was limited to Phnom Penh and findings are not representative of Cambodia as a whole, the research provides insights into the experiences of digital platform workers and their working conditions.

► **Figure 1. Map of survey location**



The sample was randomly selected across all 13 districts in Phnom Penh, and quotas were used to ensure an even distribution across the three platform services. Communes within each district were selected randomly, and the number of communes was initially chosen in rough proportion to the district population. In each commune, selection was conducted via intercept at multiple locations where platform workers can be found (for example, outside malls, restaurants and office buildings and on street corners). The final sample size was 1,237 workers, and table 3 below shows the sample distribution across each district.

► **Table 3. Final survey sample distribution by district in Phnom Penh and type of platform worker (number of surveyed workers)**

District	District population	Total	Delivery rider	Tuk-tuk driver	Taxi driver
Mean Chey	274 861	150	44	40	66
Pou Senchey	248 464	119	41	42	36
Prek Pnov	226 971	78	39	39	–
Sen Sok	188 190	179	40	45	94
Chbar Ampov	182 903	117	44	44	29
Dangkao	164 379	49	18	20	11
Chroy Chang-var	159 772	101	36	41	24
Doun Penh	159 233	59	24	17	18
Tuol Kouk	155 069	101	20	21	60
Prampir Makara	145 570	45	21	22	2
Chamkar Mon	71 092	105	21	21	63
Kamboul	70 772	42	22	19	1
Russey Keo	75 526	92	45	46	1
Total	2 122 802	1 237	415	417	405

Note: – = nil.

The survey was conducted face-to-face through computer-assisted personal interviewing (CAPI) using the Survey Solutions application. When selecting survey participants, the following eligibility criteria were used to ensure a uniform sample and quality data:

- Cambodian national;
- Minimum of three months of experience in platform work;
- Provided at least one of the following platform services: delivery rider, tuk-tuk driver or taxi driver;
- Quota of n=400 per group (delivery riders, tuk-tuk drivers and taxi drivers);
- No sex quotas were used to ensure sex representation reflects the actual workforce distribution.

2.2.2. In-depth interviews

A total of 29 workers who participated in the survey also took part in a follow-up in-depth interview (IDI). The IDIs aimed to understand better the working conditions associated with their status. The interviews were based on semi-structured questions adapted to each group of platform workers, and were equally distributed across the three service types. The questions covered access to work and working conditions. Details of the IDI sample are presented in table 4 below.

► **Table 4. Final sample size for in-depth interviews**

Type of platform worker	Sample size
Delivery rider	10
Tuk-tuk driver	10
Taxi driver	9
Total	29

2.2.3. Key informant interviews

A total of ten key informant interviews (KIIs) were conducted with key stakeholders, including platform operators, government officials, NGOs and workers' associations. Interviews were conducted face-to-face or by phone, whichever was most convenient for the participant. The ILO provided an endorsement letter to assist with recruitment, and experienced moderators were used to identify the respondents and conduct the interviews. Proper consent forms were used, and all interviews were recorded for quality control. Table 5 shows the final sample for the KIIs.

► **Table 5. Overview of key informant interview participants**

Participant	Number
Platform operators	3
Governments	3
NGOs and worker associations	4
Total	10

► 2.3. Research limitations

Data from the desk review, IDIs, KIIs and the survey were first analysed separately. Then, key findings were extrapolated based on the congruence of results across the different sources. However, some limitations were identified during the study:

- **Limited returnee migrant participation:** Given the Government of Cambodia's priority to support employment for Cambodian migrants returning from Thailand, targeted outreach was conducted to identify respondents from this group. However, the field team was unable to find any returned migrants, which suggests that this group may not constitute a significant proportion of platform workers in Phnom Penh.
- **Interviews with platform operators:** Securing interviews with platform operators proved challenging. The initial target was to interview six platform operators, but only three interviews could be secured. However, the three platform companies interviewed turned out to be very insightful, and the information gained helped to clarify matters related to algorithms and hiring processes.

- **Gender analysis constraints:** The number of female platform workers in the sample was very limited because the ride-hailing and delivery sectors are male-dominated. As a result, the study could not conduct extensive gender analysis. References to female workers are therefore descriptive only and should not be taken as representative gender findings.
- **Sample not nationally representative:** Due to budget constraints, the survey with platform workers was carried out in Phnom Penh only. The results can therefore not be viewed as being nationally representative. However, the sample is sufficiently robust to support descriptive analysis, and the results provide a valid basis for examining key characteristics and trends among platform workers within the scope of this report. An underlying assumption behind the chosen methodology was that the situation of platform workers across provinces are not expected to be significantly different.





▶ 3

Findings

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▶ 3.1. Basic characteristics of platform workers

3.1.1. Demographic profile

Platform workers were overwhelmingly male, with men constituting 99 per cent of taxi drivers, 98 per cent of tuk-tuk drivers and 92 per cent of delivery riders (table 6). Women were more likely to work as delivery riders (8 per cent) than as either tuk-tuk or taxi drivers (2 per cent and 1 per cent, respectively).

Considerable age differences are evident between platform types, with delivery riders being significantly younger than tuk-tuk or taxi drivers. Among delivery riders, 71 per cent were aged 18 to 29 years, compared to just 16 per cent of tuk-tuk drivers and 24 per cent of taxi drivers. Tuk-tuk drivers were most likely to be aged 36 or older (59 per cent). Tuk-tuk and taxi drivers were more likely to be married and have children than delivery riders, which aligns with the age distribution.

Tuk-tuk drivers had lower educational attainment, with only 36 per cent having graduated from secondary school, compared to 52 per cent of delivery riders and 60 per cent of taxi drivers. Taxi drivers were the most highly educated workers, with 81 per cent attaining a secondary diploma or higher, and 21 per cent graduating from a technical college or university.

► Table 6. Demographic profile (percentage)

Worker characteristic	Delivery riders (n=415)	Tuk-tuk drivers (n=417)	Taxi drivers (n=405)
Main platform used			
Grab	43	13	47
PassApp	2	82	23
Others	55	5	30
Sex			
Male	92	98	99
Female	8	2	1
Age			
18–29	71	16	24
30–35	20	25	36
36 and older	9	59	40
Education level			
Secondary school or lower	38	59	19
Secondary diploma	52	36	60
Technical or university	11	4	21
Married			
Yes	27	61	64
No	73	39	36
Have children			
Yes	31	78	73
No	69	22	27

► Box 1. Women platform workers

Across the three surveyed platform worker groups – taxi drivers, tuk-tuk drivers and delivery riders – respondents were overwhelmingly male, with women accounting for 1 to 8 per cent of each group. However, analysis of responses from female respondents reveals some insights about women's experience with platform work in Cambodia.

Out of the total of 42 women surveyed, 98 per cent work on only one platform, a slightly higher share than men (82 per cent). Women are also less likely to hold an additional non-platform job (2 per cent, compared with 9 per cent of men), suggesting that most women rely on platform work as their main source of income.

Women generally reported less earnings through platform work, but also work fewer hours. For example, women delivery workers earned on average US\$474 per month, compared with US\$503 for men. For tuk-tuk and taxi work, the sample is too small to generate reliable estimates, but the data indicates a similar pattern of fewer hours and lower earnings among women workers. Women had similar work-related costs to men. Among delivery riders, women report average monthly expenses of US\$152, which was almost identical to that of men (US\$153).

Work-related injuries are less common among women (15 per cent) than men (23 per cent). This may relate to their younger profile and fewer hours worked on average. Women platform workers are also less likely to have children (27 per cent) compared with men (62 per cent).

3.1.2. Years of working as a platform worker

Tuk-tuk drivers had spent the longest time working on a digital platform, averaging 3.8 years, compared to 2.1 years for both delivery and taxi drivers. Two in five tuk-tuk drivers had worked on digital platforms for five years, with only 14 per cent having worked on digital platforms for less than a year. In comparison, most delivery and taxi drivers had worked on a digital platform for two years or less, with a large portion (38 per cent of delivery riders and 47 per cent of taxi drivers) working on digital platforms for less than a year.

Workers on PassApp were more likely to have worked on the platform for longer, with 64 per cent working for three or more years (30 per cent for three to four years; 34 per cent for more than 5 years). PassApp was the first of these platforms to enter the Cambodian market in 2016, initially offering only tuk-tuk services.

3.1.3. Type of platform

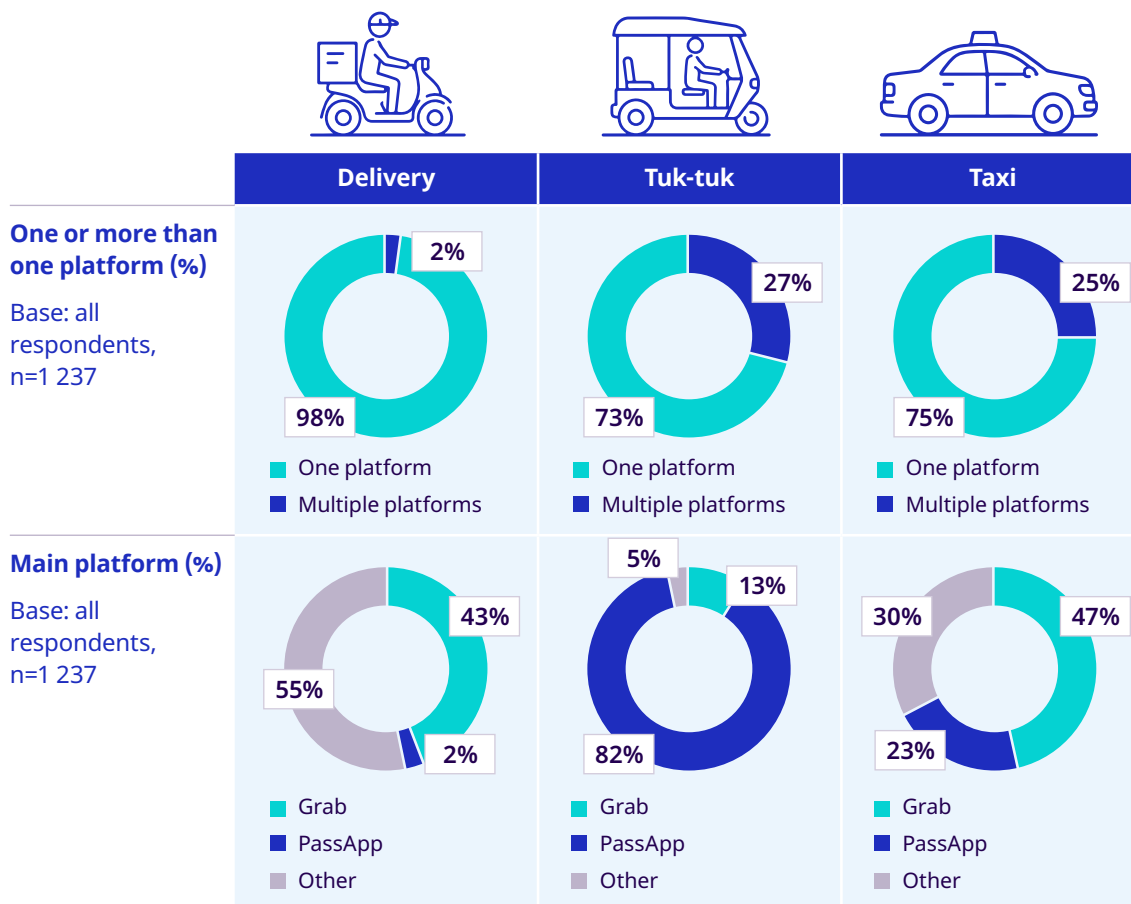
As noted above, most respondents worked on either the PassApp (36 per cent) or Grab (34 per cent) platforms. PassApp provides tuk-tuk and taxi services, whereas Grab offers food delivery and ride-hailing services. WowNow was the third most common platform used by survey respondents (16 per cent), followed by Food Panda (6 per cent) and E-GetS (6 per cent), all of which are food delivery platforms. Move and TADA Cambodia, both ride-hailing platforms, were used by only 1 per cent of sample respondents, respectively.

As shown in figure 2 below, almost all of the workers on delivery platforms (98 per cent) worked for only one platform, compared to three quarters of tuk-tuk drivers (73 per cent) and taxi drivers (75 per cent). Findings from IDIs indicate that ride-hailing workers chose to work across multiple platforms because this helps reduce their wait time between tasks.⁸ For tuk-tuk drivers, PassApp is the most used primary platform (82 per cent). For taxi drivers, almost half used Grab as their primary platform (47 per cent). A slight majority of delivery rider respondents (55 per cent) used platforms other than Grab as their primary

⁸ "Waiting time" refers to periods when workers are logged into the app and available for work but are not actively completing a task. This can include: (i) waiting time after accepting an order (for example, waiting at a restaurant or pickup point for the order to be ready); and (ii) gaps between tasks while waiting for the next job offer. This time is typically unpaid because earnings are primarily tied to completed jobs rather than time spent waiting.

platform (such as WowNow, Food Panda or E-GetS); however, Grab had the largest share of workers (43 per cent) on an individual platform basis.⁹

► **Figure 2. Number of platforms used and primary platform type**



Source: Survey with platform workers.

Tuk-tuk and taxi drivers were more likely to have additional employment outside of platform work, with 12 per cent of both groups reporting they had other, non-platform work, compared to only 2 per cent of delivery riders. Among the taxi and tuk-tuk drivers who had additional employment, that additional work was most likely to be part-time (58 per cent of both groups), although some were employed full-time in their other work (35 per cent of taxi drivers and 21 per cent of tuk-tuk drivers).

► 3.2. Challenges and opportunities of platform work in Cambodia

3.2.1. Accessing platform work

Digital platform workers primarily chose platform work for its flexibility and perceived higher pay. When asked why they sought digital platform work, four in five respondents (80 per cent) reported that they could earn more than through other employment, while the flexibility of work drove three quarters of

⁹ To qualify drivers must have a star rating of at least 4.85, a good record in the previous three months, and have completed 200 or more rides in the previous three months (Grab, n.d.).

respondents (72 per cent). A lack of alternative employment was also a major driver towards digital platform work, with 64 per cent stating that they could not find other jobs.

This was also reflected in the qualitative IDIs, with participants highlighting they joined platform work for its flexibility, easy entry requirements and perceived stable income compared to other jobs. Most appreciated that they could register without academic qualifications and that the system automatically connects drivers to customers, improving matching opportunities and reducing the demand uncertainty often associated with traditional services. Likewise, KII respondents noted that platform work creates opportunities for young people, informal workers or people without formal education, providing flexible ways to generate income. During KIIs, one of the platform operators also noted that formal background checks had been trialled previously, but uptake was low due to the costs and administrative burdens for workers (including the fee, short validity period and processing time).

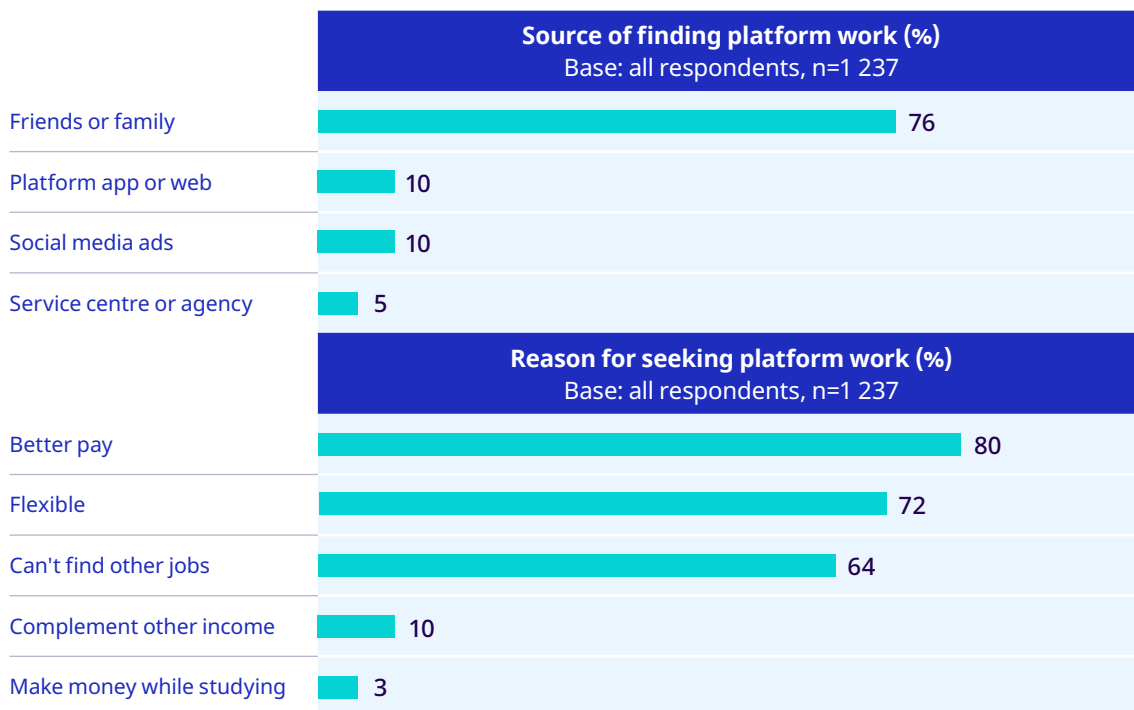
Referrals from friends or family were the most common channel through which workers found out about platform work, accounting for three quarters of respondents (76 per cent). Advertisements on social media, the platform's app or the platform's website were less prominent channels (figure 3). In qualitative interviews, participants noted that platform registration was simple, required only basic documents, involved no joining fees and allowed workers to start immediately after the initial training or orientation.¹⁰



I decided to start working with the platform because I lacked the specific skills, educational qualifications or job requirements needed for other formal employment opportunities. Platform work was more accessible for me, as it did not require a high level of education or specialized training. I saw it as a practical way to earn income independently and manage my own time without strict supervision or fixed working hours.

Digital platform worker / Delivery rider

► **Figure 3. Reasons for seeking platform work and source of referral**



Notes: The percentages in “source of finding platform work” do not add up to 100 due to rounding. Multiple responses were possible for “reason for seeking platform work”.

Source: Survey with platform workers.

¹⁰ Although there is no separate joining fee, it should be noted that many workers do have to cover the cost of some work equipment and uniforms out-of-pocket.

3.2.1.1. Employment status

Comprehensive information on how each platform covered in the survey categorizes its employment relationship with drivers or riders is difficult to ascertain. However, existing research in Cambodia indicates that the relationship is often not characterized as a formal employer–employee relationship under the Labour Law (1997) (ITF 2024). One of the major platform operators in Cambodia, Grab, categorizes its workers as “Grab Partners”, operating similarly to independent contractors (Grab, n.d.; ITF 2024). Findings from KII interviews also demonstrate that platforms define their relationships with drivers or riders as “corporate partners” or independent contractors. One government representative stated that digital platforms often reduce formal employment characteristics by using algorithmic structures rather than direct management.

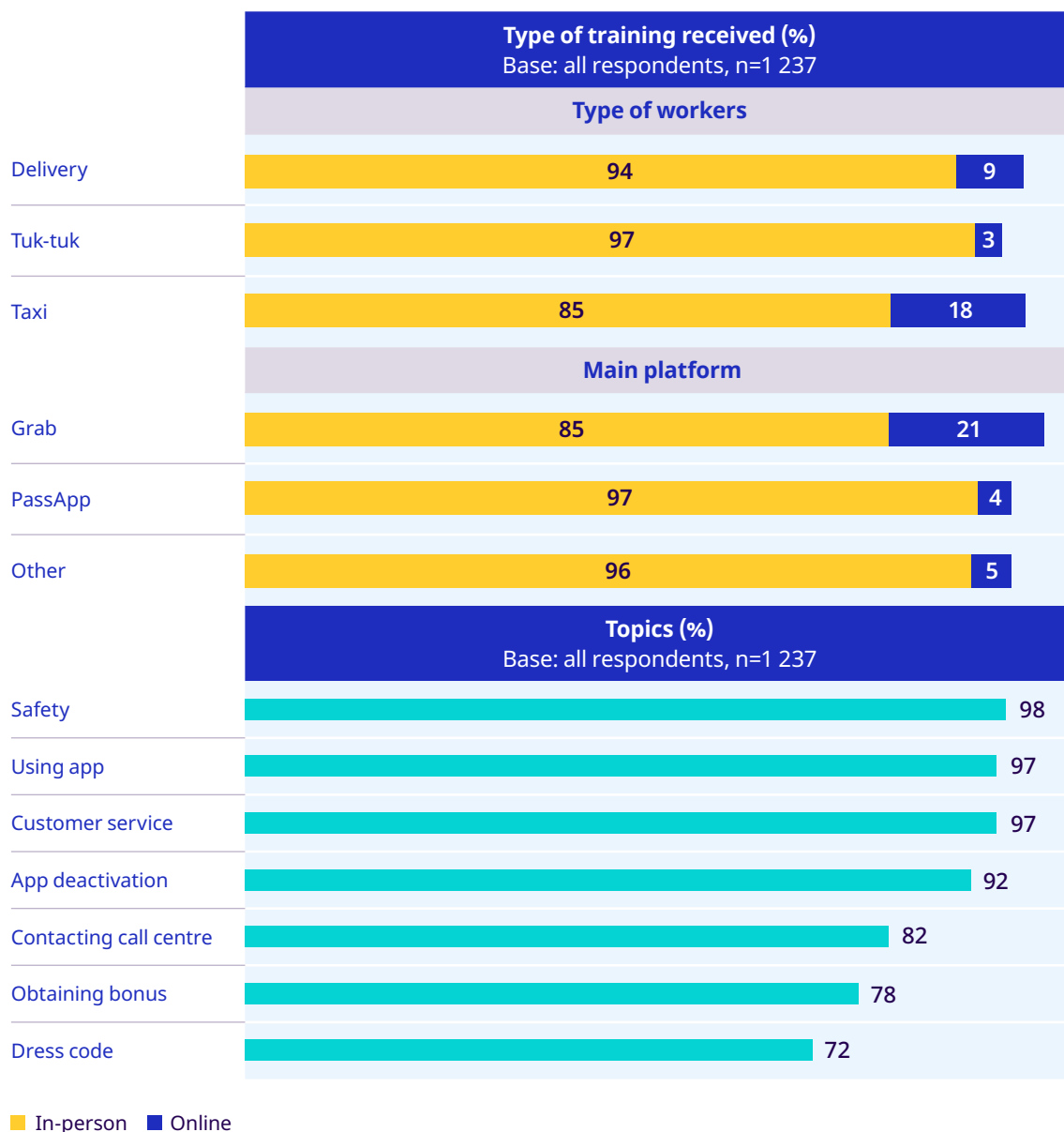
Despite this, a third of delivery rider respondents (32 per cent), along with 13 per cent of tuk-tuk drivers and 26 per cent of taxi drivers, reported that they understood themselves to be regular employees. Analysis of these workers’ responses to other survey questions regarding salary payment, work hours, access to social protection and other benefits, however, does not show complete consistency with regular employment status. This indicates a potential lack of understanding among some respondents of their employment relationship with the platform company.

The majority of tuk-tuk and taxi drivers understood their employment status as “self-employed” (73 per cent and 63 per cent, respectively), which was significantly higher than for delivery riders (45 per cent reported they were self-employed). A further 21 per cent of delivery riders, 12 per cent of tuk-tuk drivers and 10 per cent of taxi drivers considered themselves daily workers.

3.2.1.2. Training for platform workers

Under MPWT Prakas No. 100 (2021), platforms that provide digital ride-hailing services in Cambodia are required to train drivers in road traffic laws, driving skills, customer service and ethical behaviour.¹¹ All survey respondents confirmed they had received some form of training, most commonly in person. Online training is rare but more prevalent among workers on the Grab platform than on other platforms (see figure 4). Training topics were found to be uniform across platforms. Almost all workers had received training on safety (98 per cent), use of the digital application (97 per cent) and customer service (97 per cent). Most had also received information about the platform’s suspension policy, how to contact the platform’s call centre, how to obtain bonuses, and the dress code.

¹¹ Ministry of Public Works and Transport Prakas No.100, dated 21 June 2021. See also: ITF 2024.

► **Figure 4. Training received and topics covered**

Note: Multiple responses were permitted for "topics".

Source: Survey with platform workers.

Qualitative interviews with platform operators and workers confirmed that digital platforms provided onboarding and refresher training, which covered application use, customer service, safety and professional conduct. Platform operators also highlighted that refresher sessions are provided to workers and are mandatory following a complaint.



Training ensures that drivers understand how to use the app, comply with rules, maintain professional behaviour and provide a positive passenger experience.

Platform operator

3.2.1.3. Internal migration and access to work

Approximately one third of the workers interviewed for the IDIs had migrated from rural provinces to Phnom Penh, mainly seeking better job opportunities and income stability. Friends, social media and word-of-mouth were key entry channels into platform work for domestic migrants. Respondents noted that urban demand, flexibility and earning potential were much higher than what is found in rural areas.

Despite equal treatment between local workers and rural migrant workers under platform systems, migrants faced higher living costs and challenges adapting to city routes and digital systems. KII respondents also highlighted that registration can be a barrier for domestic or international migrants who do not have the required documents, such as ID cards, or lack an understanding of local administrative processes. Similarly, other respondents noted that international migrants require a work permit and a foreign employment contract to work in Cambodia legally, including on digital platforms. Other barriers for international migrants include not having a national ID, which is required to register for SIM cards or open a bank account – both of which are necessary to register and receive payments on digital platforms. The lack of social protection afforded through digital platform work was also raised as a particular issue for migrant workers, who otherwise lack the financial or social safety net in Cambodia in the event of accident or injury.

One government representative also highlighted initiatives to expand employment opportunities in digital platform work for Cambodian migrants working abroad or returned migrants, through existing mechanisms such as the Overseas Cambodian Worker Card (OCWC). Cambodian migrant workers in Thailand can apply for an OCWC, which grants them the legal right to work under bilateral agreements between the two countries (Mom 2017). One KII respondent indicated that the OCWC application and management system enables migrant workers to be monitored and targeted for employment support. In addition, the Government is focusing efforts on supporting returned migrants' access to digital platform work by providing technical and practical support, for example, through the Ministry of Labour and Vocational Training's Telegram Bot registration platform. This is part of broader efforts to support Cambodian workers returning from Thailand to access employment opportunities in Cambodia (*Khmer Times* 2025).

 I moved to Phnom Penh because there are far more opportunities.... The city offers better income potential, so I believed working here would help me earn more to support my family.

Platform worker / Taxi driver

► Box 2. Domestic migration: Moving for opportunity, facing new pressures

Internal migration plays a major role in Cambodia's platform workforce. One of the interviewed drivers on a digital ride-hailing platform had moved from Prey Veng Province to Phnom Penh after struggling to find stable work in his hometown. The city offered "more opportunities and higher passenger demand", and a friend already working on a digital platform encouraged him to try it.

After starting work on a leading ride-hailing and food delivery platform, he faced challenges that he considered to be typical for new migrants. His living costs became higher, he was unfamiliar with the city's roads and routes, and he felt increasing pressure to earn enough to cover his daily expenses. He also did not have any family support in the city. Although he had not experienced any discrimination, he emphasized that start-up costs – mainly vehicle purchase, fuel and mobile phone – were significant barriers for rural-to-urban migrants hoping to engage in platform work.

Source: In-depth interview with platform worker.

3.2.2. Working conditions

3.2.2.1. Work hours and waiting time

Across all platform types, workers worked an average of 6.7 or 6.8 days per week and 11 to 12 hours per day, including waiting time (see figure 5). This was consistent whether workers worked only on one platform or across multiple platforms.

Among delivery riders, tuk-tuk drivers and taxi drivers, workers reported an average of 2.3 hours of waiting time per day. The survey did not distinguish between time spent waiting for orders while performing the task,¹² time during which workers remain connected to the application to respond to new orders, and time spent taking breaks, during which they might disconnect from the application. Qualitative findings indicate that platform workers considered all these types of non-working periods as waiting time, and most reported remaining connected to applications and responsive to new orders, noting that responsiveness affects future work allocation. While remaining connected and waiting for new orders, workers generally spent their waiting time resting, eating or checking their phones, with a small portion stating they were able to run small errands.

Among respondents who worked on only one platform, delivery riders and taxi drivers had the least waiting time, averaging 2.1 hours per day. Tuk-tuk drivers reported the highest average waiting time, of 2.4 hours per day. Findings from the IDIs suggest that taxi drivers register on additional platforms when they already experience low demand on their initial platform, so low demand is the catalyst for registering on a second platform.

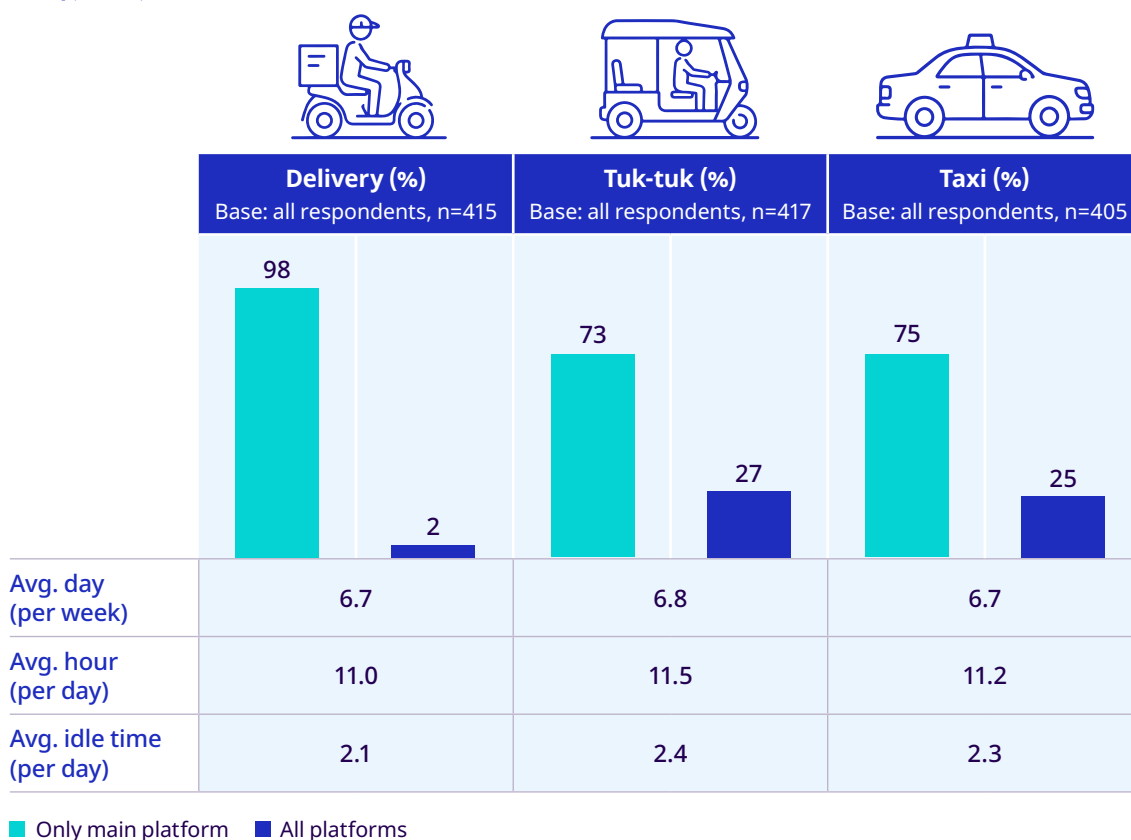
Platform operators, interviewed via the KIIs, reported that they were aware that many workers exceeded 60 hours per week. One respondent noted that, to address this concern, their company's application includes an in-built alert system that notifies drivers when they have been online for more than ten hours in a day. The alert acts as a reminder to workers to take a break, but does not restrict them from continuing to work if they chose to do so.



Even though this waiting period gives me a short break, I cannot engage in other work or personal activities because I need to remain available to accept orders.

Platform worker / Delivery rider

¹² For example, while waiting for the food to be ready or to reach the pick-up point.

► **Figure 5. Multiple platform profile, average days and hours worked, and waiting time, by type of platform worker**

Source: Survey with platform workers.

3.2.3. Platform earnings and associated expenses

3.2.3.1. Payment and fee structure on platforms

Most of the surveyed workers were paid per booking or per ride. Almost all tuk-tuk drivers (99 per cent) reported they were paid per booking, along with 87 per cent of delivery and 81 per cent of taxi drivers. One in five taxi drivers (19 per cent) reported earning a fixed salary, as did 13 per cent of delivery riders (see table 7). While the salary arrangements offered by individual platform companies were complex to confirm, desk review findings indicate that only two of the digital platforms represented in the survey (WowNow and E-GetS) offer fixed salaries to platform workers. Reporting a fixed salary arrangement does not necessarily indicate a formal employer–employee relationship, and workers may be engaged under different arrangements depending on the platform.

Workers were most likely to receive payment upon completion of each order, allowing them to withdraw their earnings at any time. This was true for three in five tuk-tuk (62 per cent) and taxi drivers (60 per cent), and 44 per cent of delivery riders. Almost one third of tuk-tuk drivers (29 per cent) and a quarter of delivery riders (23 per cent) reported they received payment daily, but this was less common among taxi drivers (14 per cent). A quarter of taxi drivers (26 per cent) and delivery riders (27 per cent) only received payment monthly; however, this was far less likely for tuk-tuk drivers (7 per cent).

Bank transfer was the most common way to receive earnings from the platform; however, tuk-tuk drivers were more frequently paid in cash or via other payment methods than taxi drivers or delivery riders. Most workers were required to pay a platform commission fee per booking or ride, though this was less common among delivery riders (76 per cent) than among tuk-tuk and taxi drivers (92 per cent and 94 per cent, respectively). Many platform workers also reported paying fees to receive or withdraw money.

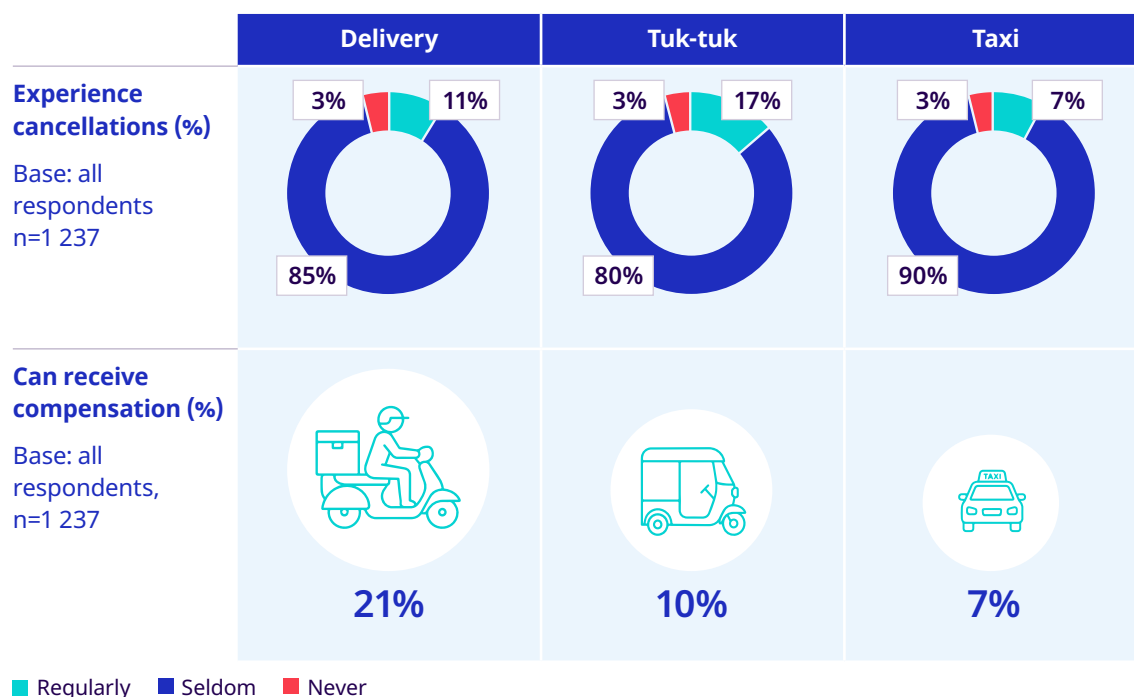
One of the interviewed platform operators during a KII explained that their company charges a service fee to platform workers, while food delivery fees are primarily charged to merchants. The platform also described a minimum base fare and dynamic pricing that can increase during peak hours. One platform operator further noted that it uses incentives rather than fixed bonuses, such as small top-ups for completing trips during peak periods, to encourage drivers to go online when supply is low.

► **Table 7. Overview of payment and fee structure (percentage)**

Payment profile	Delivery riders (n=415)	Tuk-tuk drivers (n=417)	Taxi drivers (n=405)
Type of salary payment			
Fixed salary	13	1	19
Paid per booking or ride	87	99	81
Payment frequency			
Per order (can withdraw money at any time)	44	62	60
Daily	23	29	14
Weekly	6	2	<1
Monthly	27	7	26
Salary payout method			
Bank transfer	98	88	98
Cash or other	2	12	2
Fees (more than one response possible)			
Pay platform commission fee	76	92	94
Pay for receiving money	32	45	34
Pay for withdrawing money	18	19	11

Most workers also received bonuses, which made up less than half of their earnings. Delivery riders were more likely to earn bonuses, with four in five reporting they sometimes received a bonus (81 per cent) and 5 per cent reporting they often received it. In comparison, only three fifths of tuk-tuk and taxi drivers (59 per cent) sometimes received a bonus, while 2 and 3 per cent, respectively, often received it. Across all platform types, bonuses were obtained for reaching targets or for working during peak periods, when it was raining or on holidays. Interviews with key informants also highlighted that platform workers can earn a one-time bonus for referring new workers or for advertising the company logo on their vehicles (US\$8–15 per month). Platform representatives also noted that their companies have “top driver” reward programmes, providing additional incentives for drivers/riders who consistently maintain high ratings.

As shown in figure 6 below, platform workers were also rarely compensated for order cancellations. While almost all respondents experienced order or job cancellations, most reported not receiving compensation for cancelled orders. However, compensation was more common among delivery riders, with 21 per cent reporting compensation (compared to 10 per cent of tuk-tuk drivers and 7 per cent of taxi drivers).

► **Figure 6. Order cancellations and compensation for order cancellations**

Source: Survey with platform workers.

3.2.3.2. Workers' earnings and expenses associated with platform work

Platform workers had a range of expenses, including fuel, uniforms and equipment, and vehicle and phone costs. Not surprisingly, taxi drivers reported the highest expenses, averaging US\$377 per month. This is compared to US\$159 per month for tuk-tuk drivers and US\$146 for delivery riders (see table 8). Fuel costs constituted a significant portion of total expenses, with taxi drivers paying US\$251 per month for fuel, and tuk-tuk and delivery riders paying US\$104 and US\$91, respectively. Vehicle repairs also accounted for a large share of expenses, especially for taxi drivers. Compared to other platform types, delivery riders spent a larger share of their costs on uniforms and equipment. Delivery riders are often required to wear a uniform and obtain a cooler box, delivery bag and helmet.

During the qualitative interviews, respondents noted high initial costs for vehicles, documentation and equipment when they first began working. These expenses were self-financed, often through personal savings or loans. It should be noted that many platform workers have loans on their vehicles, which depreciate over time.¹³

I did not receive any financial or non-financial support when I started. Everything from buying the car to covering fuel and maintenance costs is entirely self-financed.

Platform worker / Taxi rider

¹³ Since most workers own their vehicle, these costs should also have been included, but there was no reliable way to estimate these costs.

► **Table 8. Monthly expenses associated with platform work (US\$)**

Monthly expense	Delivery riders (n=415)	Tuk-tuk drivers (n=417)	Taxi drivers (n=405)
Costs for uniform and equipment*	32	20	35
Fuel costs	91	104	251
Phone expenses	9	9	10
Vehicle repairs	14	24	77
Vehicle registration and insurance	0.2	1	5
Average monthly expenses	146	159	377
Total annual expenses	1 746	1 907	4 528

* This expense is sometimes ultimately paid by the platform, but the worker has to pay upfront and is reimbursed when the equipment is returned.

In qualitative interviews, respondents highlighted fuel, vehicle maintenance and mobile phone expenses as their most considerable recurring costs. Most workers also paid 15 to 20 per cent commission fees to platforms per ride. Expenses were covered entirely by personal income and savings, leaving workers financially vulnerable during periods of low demand.

Workers who worked across various platforms or jobs (mainly tuk-tuk and taxi drivers) earned more without increasing their work hours.

 My main costs are for fuel, gas and maintenance.... These daily costs take up a large portion of my income, especially now that customer bookings have decreased.

Platform worker / Tuk-tuk driver

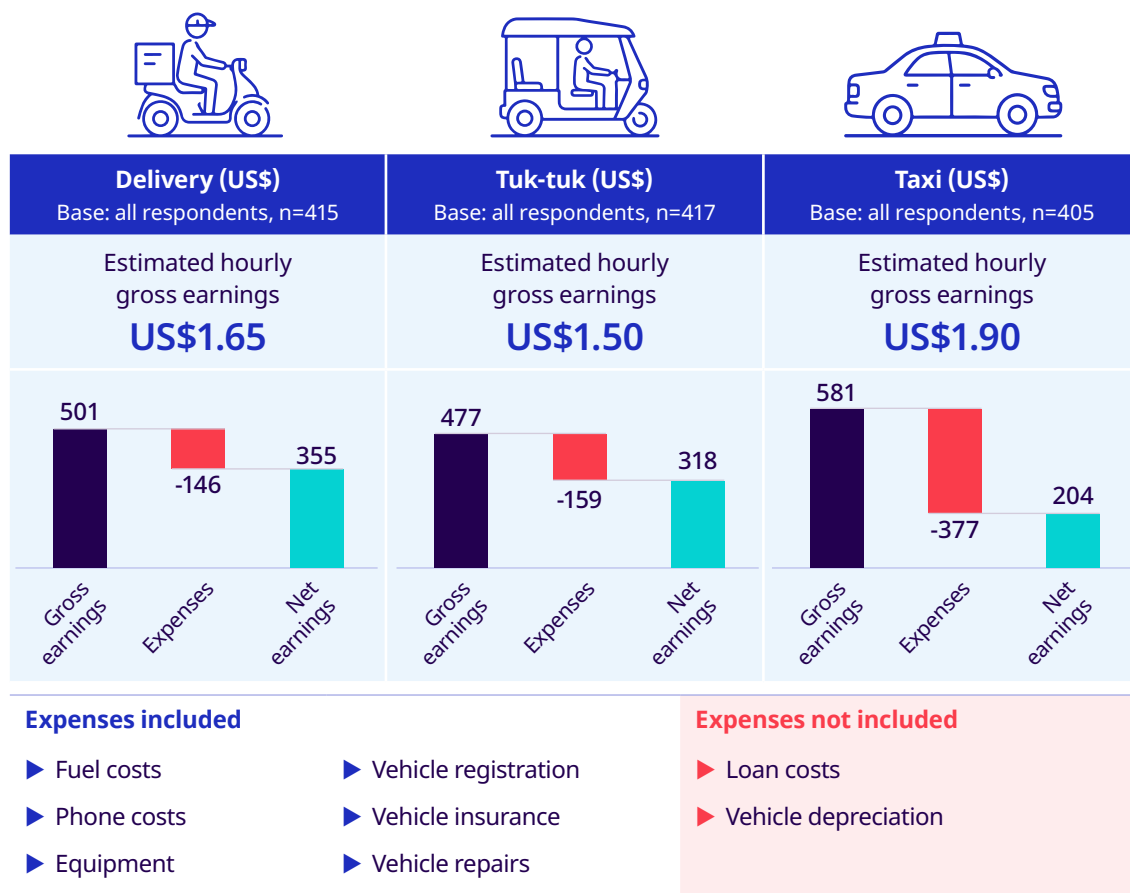
Figure 7 below shows workers' average earnings after deducting operational expenses/costs, including fuel, phone costs, equipment, vehicle registration and insurance, and vehicle repairs. The average gross earnings in figure 7 refer to respondents' average total gross earnings across all of the digital platforms they are on, including tips.

The gross earnings of taxi drivers were the highest among the three platform types. Taxi drivers earned an average of US\$581 per month from the platform, equivalent to US\$1.90 per hour, with tips accounting for US\$33 (6 per cent). This was followed by delivery riders, who earned a monthly average of US\$501, equivalent to US\$1.65 per hour, with tips representing 5 per cent. Meanwhile, tuk-tuk drivers earned US\$477, equivalent to US\$1.50 per hour, with tips at 4 per cent.

Reflecting lower expenses, delivery riders had the highest monthly earnings after deducting operational expenses/costs (US\$355), followed by tuk-tuk drivers (US\$318) and taxi drivers (US\$204). It should be noted that vehicle loan payments and depreciation are not included in the total costs, suggesting the earnings after deducting operational expenses/costs may be a conservative estimate.

With lower earnings after deducting operational expenses/costs, tuk-tuk drivers and taxi drivers also stated they were less likely to earn enough to cover their household expenses, with only 68 per cent of tuk-tuk drivers and three quarters of taxi drivers (75 per cent) reporting that their earnings were sufficient. By comparison, four in five delivery riders (82 per cent) earned enough to cover household expenses. As discussed in section 3.1, tuk-tuk and taxi drivers were significantly more likely to be married and have children than delivery riders, suggesting they have higher household expenses overall.

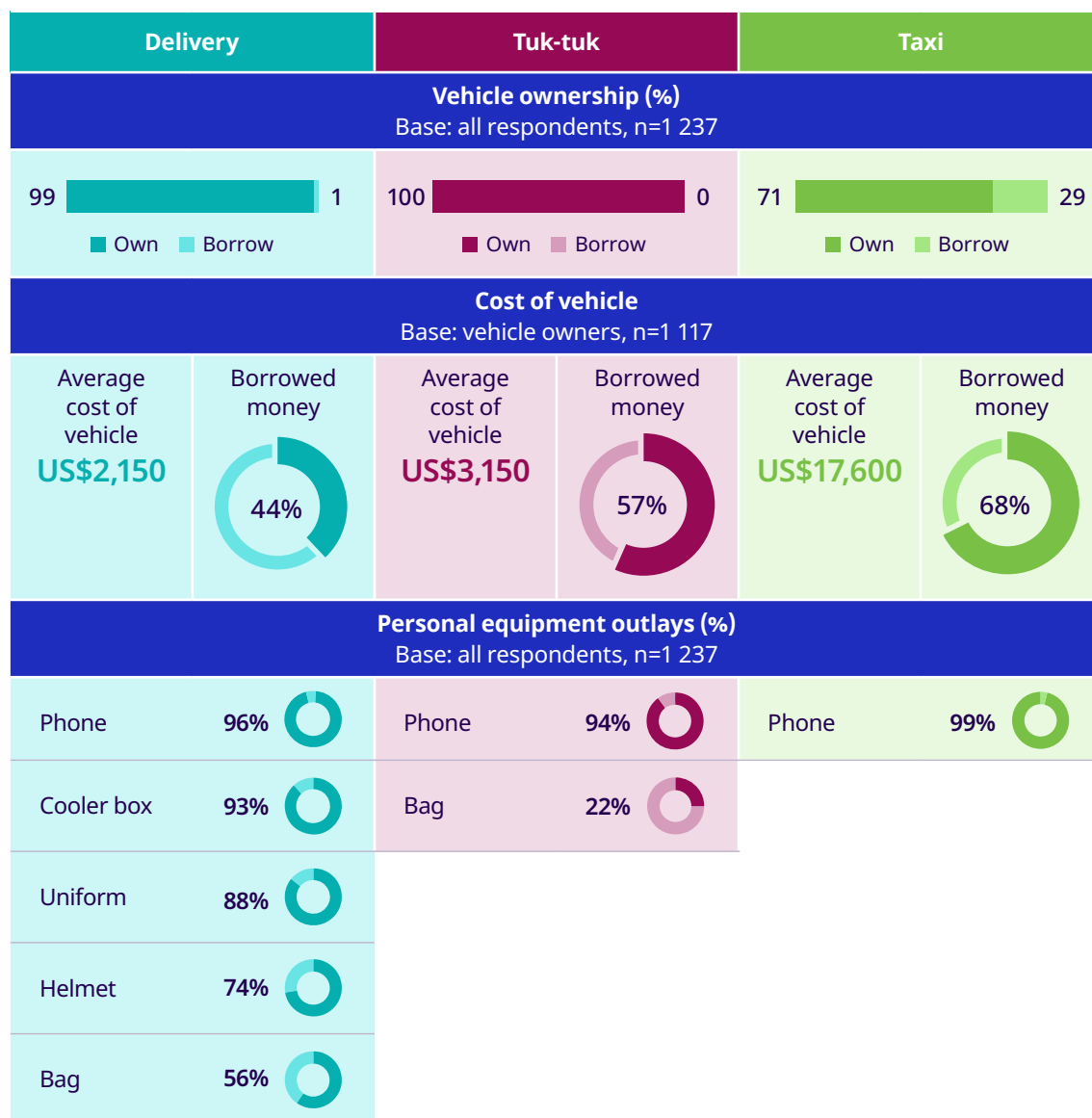
► **Figure 7. Average earnings and expenses by type of service**



Note: "Net earnings" refers to earnings after deducting operational expenses/costs.

Source: Survey with platform workers.

Due to the lower vehicle investment cost, almost all delivery and tuk-tuk drivers owned their own vehicles, compared with only 71 per cent of taxi drivers (see figure 8). Many workers had borrowed money to buy their vehicles, with taxi drivers the most likely to have borrowed (68 per cent), followed by tuk-tuk drivers (57 per cent) and delivery riders (44 per cent). One platform operator interviewed through the KIIs highlighted that their company offers electric tuk-tuks to drivers through lease-to-own arrangements. Notably, taxi drivers spent significantly more on their vehicles than tuk-tuk or delivery riders. Respondents reported an average vehicle cost of US\$17,600, compared to US\$3,150 for a tuk-tuk and US\$2,150 for a delivery vehicle (for example, a motorbike). Most platform workers also had to make personal investments for necessary equipment, such as a mobile phone.

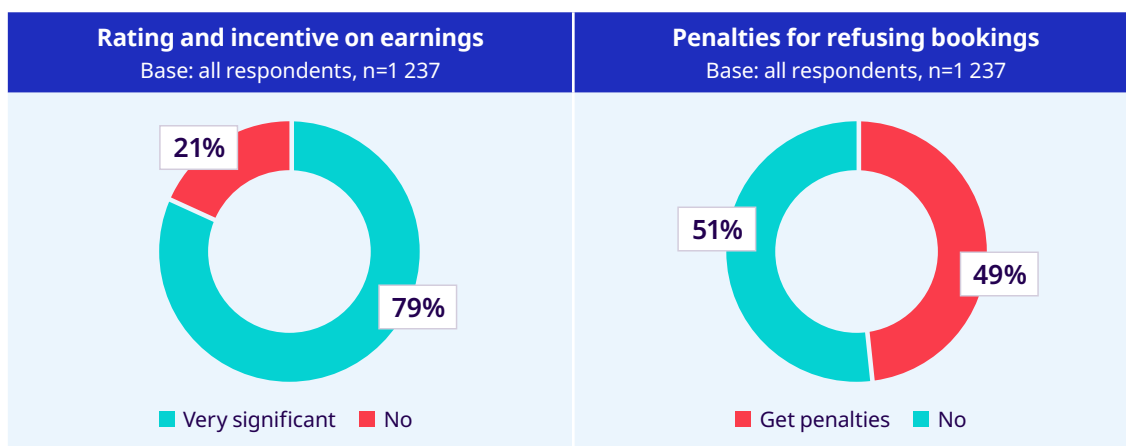
► **Figure 8. Vehicle ownership and work-related costs**

Source: Survey with platform workers.

► 3.3. Use of automated systems

3.3.1. Task assignment and work organization

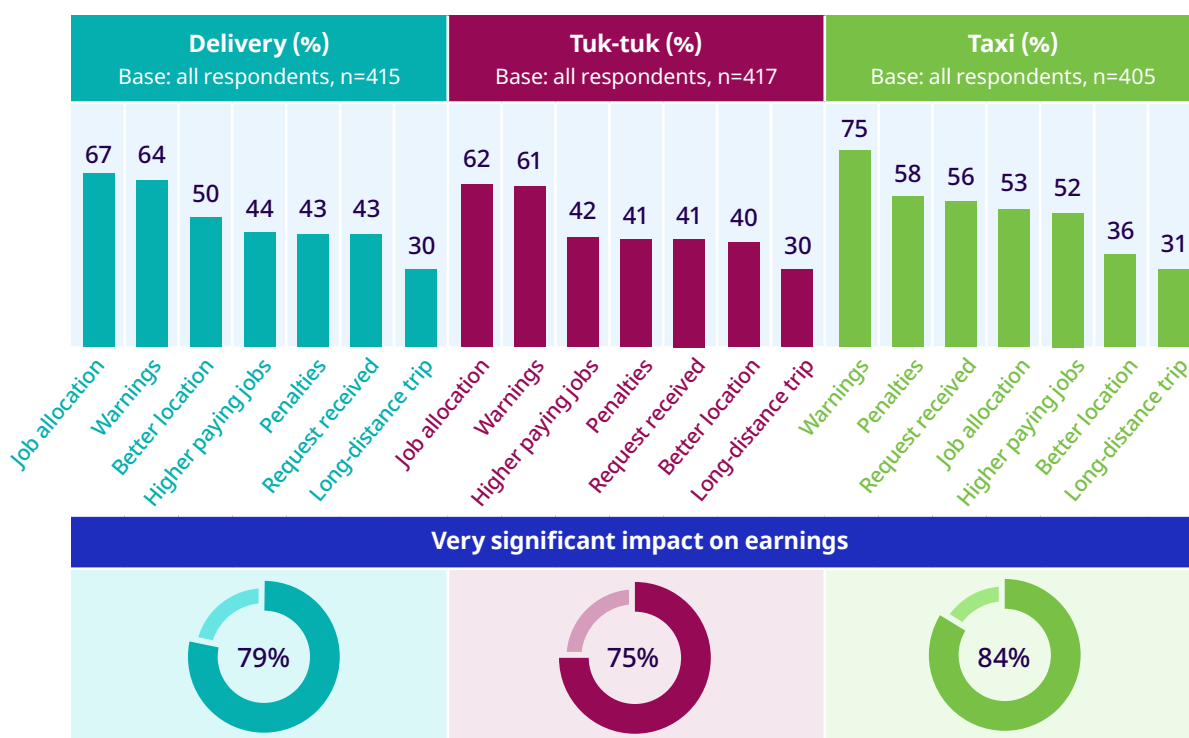
Digital platforms use algorithms to organize and facilitate work, including by assigning tasks and matching drivers with customers. The platform's automated systems directly control task allocation, ratings and penalties, and may determine the number of jobs a worker receives and how much they earn on the platform. Ratings and penalties affected platform workers consistently across all three platform service types. Most respondents reported that their rating directly impacted job or order allocation, and nearly four in five (79 per cent) indicated that their rating had a very significant impact on their earnings (see figure 9). Half of all the surveyed platform workers (49 per cent) also reported being penalized for not accepting orders or for cancelling orders.

► **Figure 9. Algorithmic impact on earnings and penalties**

Source: Survey with platform workers.

3.3.2. Ratings and penalties

As shown in figure 10, taxi drivers were slightly more likely to report that ratings had a significant impact on their earnings, although the effect was important for all three types of workers. Across all of the types of services analysed, workers reported that poor ratings affected their job allocation, including access to higher-paying and well-located jobs. Many had also received warnings or penalties in response to poor ratings. Platform operators interviewed during KIIs noted that their companies have processes for addressing low driver ratings, including contacting them to discuss their ratings and providing additional training or guidance to improve their performance. The operators also confirmed that the platforms' algorithms incentivize high ratings by prioritizing top-rated drivers for jobs.

► **Figure 10. Impact of ratings on work and earnings**

Note: Multiple responses were permitted.

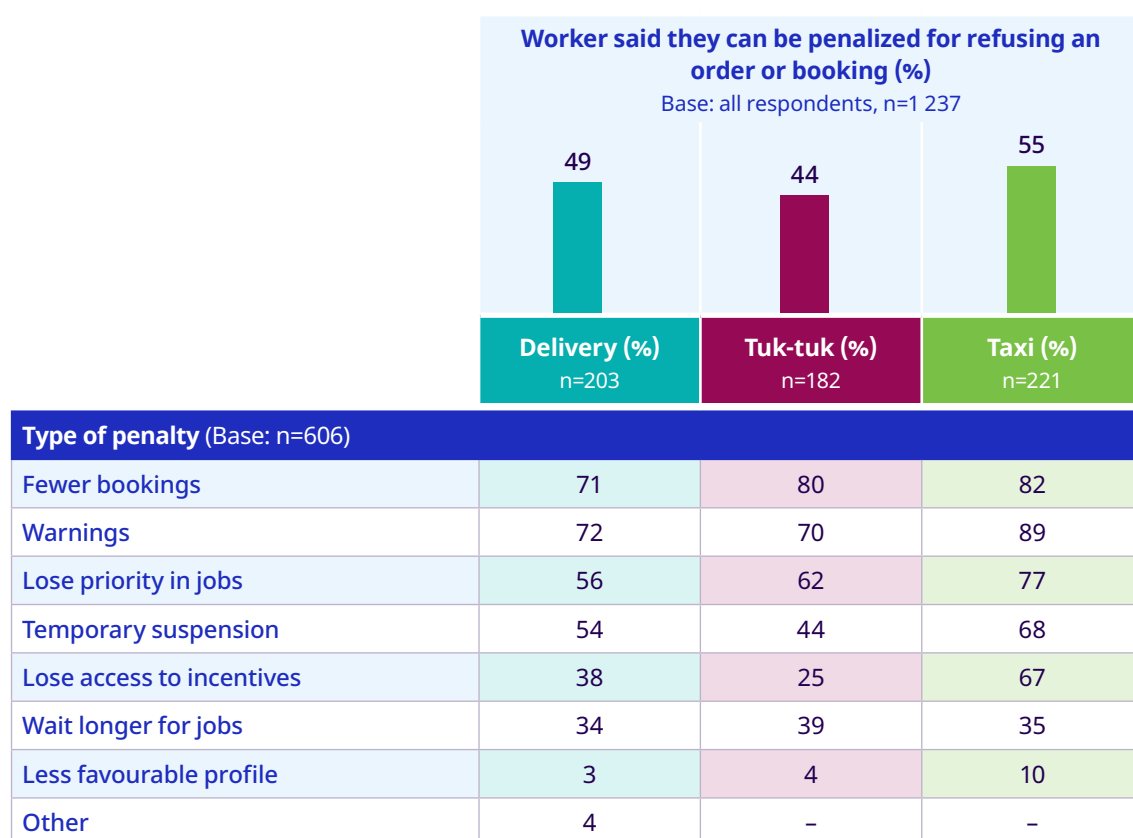
Source: Survey with platform workers.

When I receive high ratings from customers, I tend to get more delivery orders, making the work more convenient and potentially more profitable.

Platform worker / Delivery driver

Workers often received penalties for refusing or cancelling an order. Taxi drivers were slightly more likely to be penalized (55 per cent); however, this was also true for almost half of delivery riders (49 per cent) and for 44 per cent of tuk-tuk drivers (see figure 11). Workers were penalized primarily by receiving fewer bookings: four in five taxi (82 per cent) and tuk-tuk drivers (80 per cent) and 71 per cent of delivery riders stated they had been penalized in this way. Most workers who had refused or cancelled an order also received a warning for doing so. Some respondents also reported that their accounts were temporarily suspended as a penalty.

► **Figure 11. Penalties for refusing or cancelling orders**

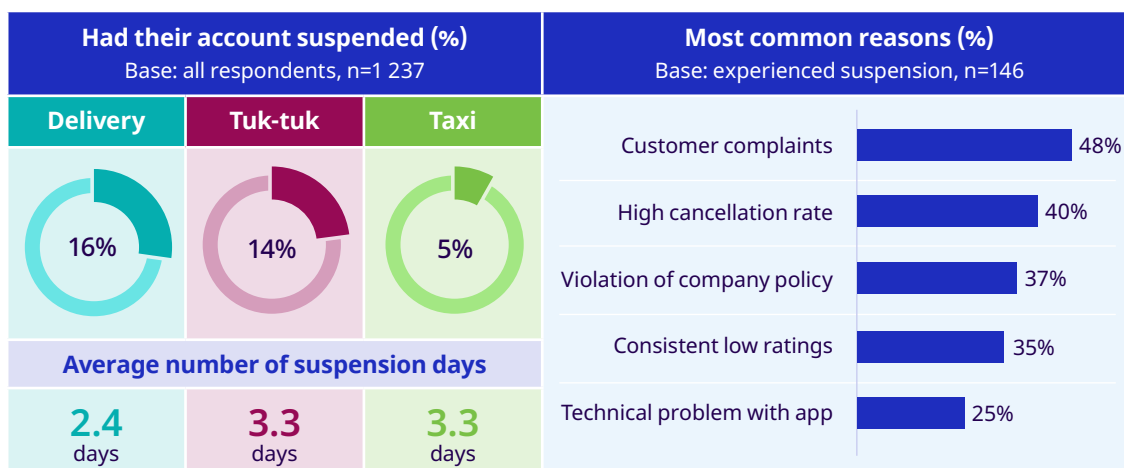


Note: –= nil. Multiple responses were permitted for "type of penalty".

Source: Survey with platform workers.

3.3.3. Account suspension

Among survey respondents, delivery riders (16 per cent) and tuk-tuk drivers (14 per cent) were more likely to have had their accounts suspended temporarily, compared to only 5 per cent of taxi drivers (see figure 12). Tuk-tuk and taxi drivers, however, experienced longer suspensions, averaging 3.3 days, compared to 2.4 days for delivery riders. Across all platform services, the most common reasons for account suspension were customer complaints (48 per cent) or a high cancellation rate (40 per cent). Other reasons included violations of company policy, consistently low ratings and technical issues with the digital application itself. KII interviews also confirmed that platform workers can have their accounts suspended immediately if they receive a low rating due to a one-off serious issue or for failing to improve their ratings over time.

► **Figure 12. Account suspension**

Note: Multiple responses were permitted for "most common reasons".

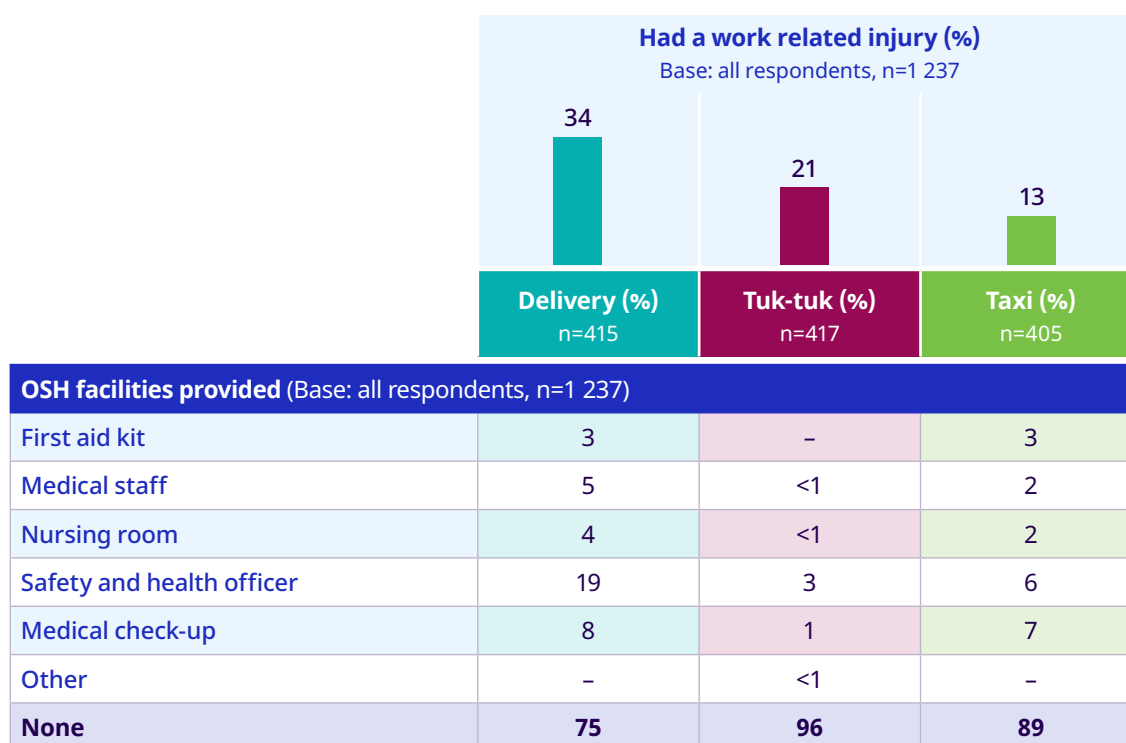
Source: Survey with platform workers.

► 3.4. Occupational safety and health

Due to the nature of transport and delivery work, location-based digital platform workers experience unique workplace health and safety risks (ILO 2021). For delivery riders in particular, the risk of accidents and injury is exacerbated, as they travel by motorbike and are less protected than tuk-tuk and taxi drivers. Drivers in Phnom Penh also face safety issues due to poor infrastructure, traffic congestion and the increased prevalence of speeding and traffic violations, which may increase accident risk if work processes that are defined automatically do not account for these safety issues (ITF 2024).

This is reflected in the survey data, with a third of all delivery riders (34 per cent) experiencing a work-related injury. One in five tuk-tuk drivers (21 per cent) had also been injured while working, as well as 13 per cent of taxi drivers (see figure 13). As a global comparison, research from the ILO in 2021 indicates that 21 per cent of app-based delivery riders and 10 per cent of taxi drivers had been injured at work. However, this was as high as 47 per cent for delivery riders in some countries, such as Mexico (ILO 2021).

Most survey respondents reported that the digital labour platform provided no occupational safety and health (OSH) facilities. One in five delivery riders (19 per cent) indicated that the platform company had a safety and health officer; however, no additional information was obtained about the type of support this officer provided or about access arrangements.

► **Figure 13. Work-related injuries and occupational safety and health facilities available**

Source: Survey with platform workers.

Survey respondents reported experiencing a range of OSH issues, including accidents, theft, conflicts with customers, fatigue, body pain and illness due to long work hours, exposure to weather or contact with sick customers. In IDIs, workers noted that while platforms provided basic onboarding, they received limited safety guidance and little to no protective equipment.

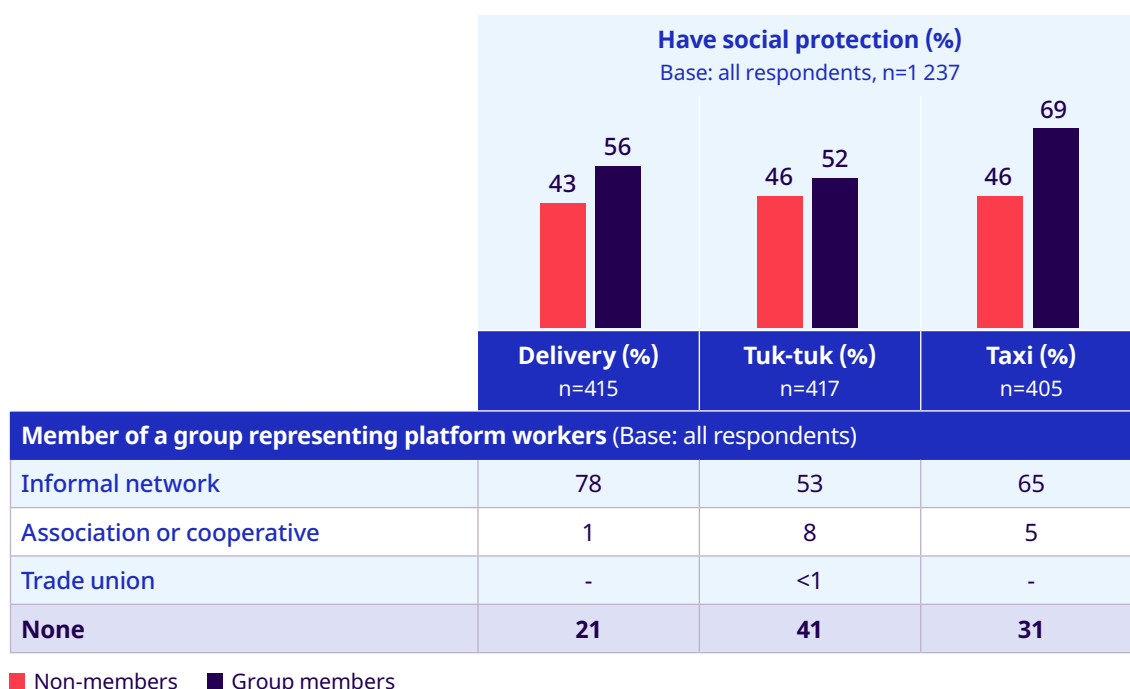
Platform workers also reported high levels of work-related stress. Across all surveyed platform workers, cancellation was the most significant source of stress (74 per cent), followed by risk of accidents (64 per cent) and customer complaints (60 per cent). Insights from qualitative IDIs also show that some workers had experienced social stigma or abuse from customers, although this was rare.

Findings from KIIs highlight limitations in OSH protections for platform workers, with only minimal, voluntary steps taken by a few operators. Two platform operator respondents described in-app fatigue management features, including prompts and checks when drivers have been online for extended periods. Some KII respondents representing government and workers' associations or trade unions noted that employment relationship ambiguity and poor regulatory enforcement allow platforms to prioritize cost and algorithmic efficiency over worker safety. They suggested imposing mandatory OSH standards regardless of employment status, alongside stricter insurance requirements, safety-by-design algorithms and better enforcement.

► 3.5. Trade unionization

Almost none of the workers surveyed were members of a trade union or other formal association. Informal networks have developed in their place, providing workers with a mechanism for organizing collectively. This is more common among delivery riders, with almost four in five respondents (78 per cent) reporting they were part of an informal network, alongside 65 per cent of taxi drivers and 53 per cent of tuk-tuk drivers (see figure 14). Further analysis found that workers who belonged to any type of group were more likely to have some form of social protection than non-members. This indicates that the informal network may serve as an awareness-raising mechanism. A similar relationship was found between group membership and experiences of discrimination, with platform workers who belonged to any group being significantly less likely to report discrimination.

► **Figure 14. Group membership and social protection**



Source: Survey with platform workers.

Some workers interviewed through IDIs highlighted that they did not have a representative body or trade union to advocate for their rights, so most handled problems independently.

I do not have anyone to speak for, or represent, our interests.... This lack of representation means we have to address problems individually.

Platform worker / Tuk-tuk driver

In interviews with key informants, respondents recognized that platform workers have limited access to trade unionization and collective bargaining because they operate as independent contractors, work across multiple platforms, or lack knowledge of their labour rights and protections. Platform operators highlighted that in the absence of formal representation through trade unions, their companies have in-person and digital mechanisms for feedback and consultation with drivers or riders. Key informants representing trade unions and associations noted that their most significant advocacy piece regarding platform workers' concerns is seeking formal employment classification.

► Box 3. A delivery worker's perspectives on daily interactions, communication, and safety

One of the interviewed delivery riders reported that he occasionally encounters challenges during his workday, such as critical comments from other drivers about speed or traffic navigation, and instances when shop staff treat him less favourably than regular customers. He has noticed that these experiences reflect some of the perceptions workers face while performing their duties.

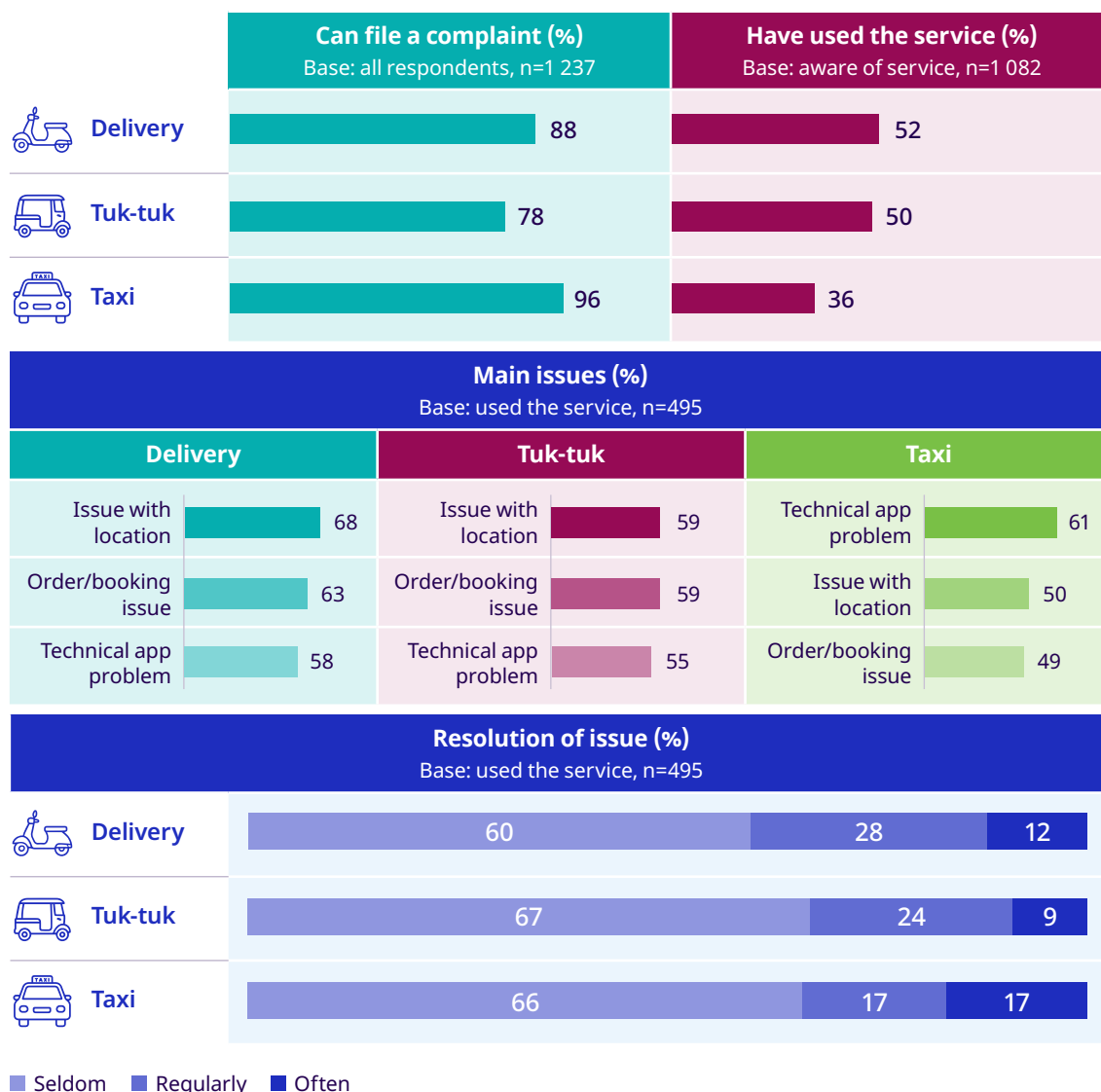
He has not raised these issues through the platform's communication channels or with external organizations. He tends to handle concerns on his own and prefers not to report problems unless it is necessary. He also mentioned that while the application's communication system is convenient for basic support, it is less suited for more detailed feedback or dialogue. He would like to see additional opportunities for two-way communication that could help strengthen understanding between workers and the platform operator.

He has not personally experienced any accidents, but felt that existing guidance and training focuses mainly on general traffic rules and application use, rather than worker safety. From his perspective, more regular safety briefings, clearer guidance during order pick-ups and access to protective equipment could further support workers in managing risks on the road.

Source: In-depth interview with platform delivery rider.

► 3.6. Dispute resolution mechanisms

Most workers surveyed for this study said they could file a complaint through the digital platform, but that issues were rarely resolved satisfactorily. More than three quarters of workers across all service types – 78 per cent of tuk-tuk drivers, 88 per cent of delivery riders and 96 per cent of taxi drivers – reported they could make a complaint, with approximately a third of taxi drivers (36 per cent) and half of tuk-tuk drivers (50 per cent) and delivery riders (52 per cent) having done so. Among the workers who had submitted a complaint, approximately two thirds said they seldom had their issue resolved (see figure 15). The primary issues reported by workers included technical problems with the application, order or booking issues, and location problems.

► **Figure 15. Access to complaint and dispute resolution processes**

Note: Multiple responses were permitted for "main issues".

Source: Survey with platform workers.

Qualitative findings indicate that workers received minimal support from digital platforms for serious issues such as accidents or theft, though minor technical and payment issues were generally resolved quickly. According to the IDIs with platform workers, communication between workers and platforms was primarily limited to transactional matters – such as application errors, payment problems, cancellations, no-shows or customer complaints – and rarely addressed broader concerns. One worker interviewed suggested that because the digital platform does not provide insurance or compensation for drivers, it is difficult for them to effectively resolve serious issues such as accidents or theft.

 Small issues can be solved easily, but serious ones remain unresolved because the platform doesn't provide insurance or compensation for drivers.

Platform worker / Taxi driver

Qualitative interviews with key informants revealed complaints, and dispute resolution is primarily handled through the digital application, using chat or messaging, with some limited access to phone support (phone calls) for serious issues. One platform operator stated that the company has in-person processes for consulting with drivers on changes that affect them, such as fare calculation updates or fee amendments.

Since the completion of the research study, the Government has issued Notification No. 1107 of 22 July 2026, designating the MLVT as the responsible authority for settling disputes between platform companies and platform workers.

► 3.7. Social security

Approximately half of all survey respondents reported being enrolled in social security, with taxi drivers having the highest enrolment at 61 per cent, compared to 53 per cent of delivery riders and 49 per cent of tuk-tuk drivers (see figure 16).

Among the surveyed workers with social security, most had voluntary NSSF coverage, with this being the case for 94 per cent of tuk-tuk and taxi drivers and 62 per cent of delivery riders.¹⁴ In addition, two in five delivery riders who reported having social security had mandatory NSSF coverage (38 per cent).¹⁵ Almost all of the taxi and tuk-tuk drivers with social security coverage (96 per cent) said they were responsible for enrolling themselves in social security, whereas 47 per cent of enrolled delivery riders reported that the platform enrolled them.

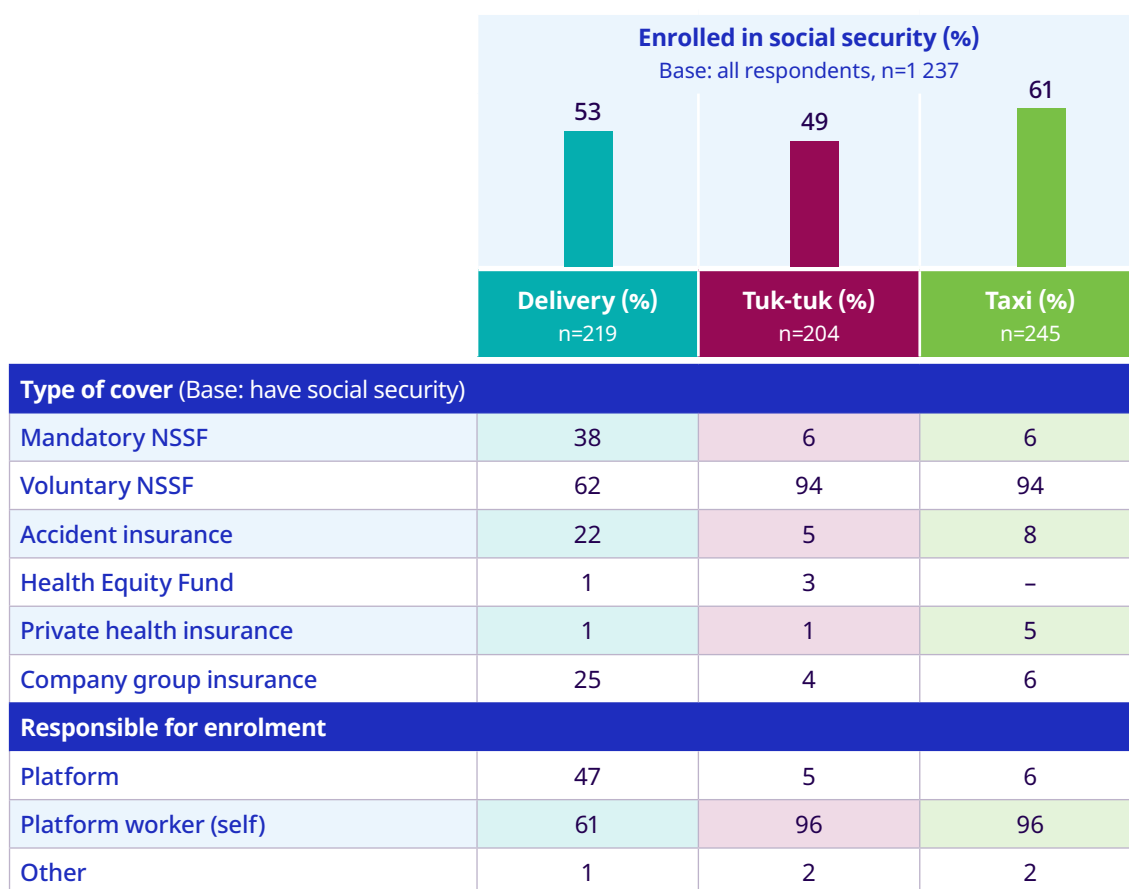
The social security enrolment rates among the surveyed workers are notably higher when compared to national coverage.¹⁶ In 2022, 20.8 per cent of the Cambodian population was covered by at least one form of social protection. However, based on the most recent national data, social security coverage across Cambodia is mainly under the voluntary scheme, which only commenced in 2023 (ILO, n.d.-a; ILO, n.d.-b).

Platform operators interviewed emphasized that while workers are not treated as employees under their operating model, their company actively promotes and facilitates worker registration with the national social security system. This is particularly true for delivery riders, given the accident risk involved. Platform operators also highlighted that individual platforms offer varying levels of protection, with some providing accident insurance for workers. One KII respondent noted that their platform provides accident insurance with coverage for the driver, the vehicle and passengers, but that coverage only applies when the driver is actively working on the platform. Workers are therefore not covered during waiting time between tasks or while they are reaching the pick-up point where the task officially starts, making comprehensive coverage more challenging. The platform operators interviewed considered insurance an essential measure for protecting workers and indicated interest in expanding coverage as part of their broader safety and compliance efforts.

¹⁴ While digital platforms are often not required to make mandatory contributions to the NSSF due to contractual arrangements with workers, mechanisms exist for workers to register and make voluntary contributions under the voluntary health insurance scheme for self-employed workers and dependents (launched in 2023).

¹⁵ Under mandatory NSSF coverage, both the employer and the employee financially contribute money to the scheme. However, for voluntary coverage, it is only the workers themselves (mostly informal workers or self-employed) who contribute to the scheme. The mandatory scheme covers healthcare, pension and work injury, while the voluntary scheme covers only healthcare (see the Law on Social Security Schemes (2019)).

¹⁶ Here, again, it is relevant to note that the surveyed workers were all in Phnom Penh, and as such, any comparisons to national figures must be taken as indicative and not representative.

► **Figure 16. Social security coverage**

Note: Multiple responses were permitted.

Source: Survey with platform workers.

► 3.8. Perceptions on the future of platform work

Platform workers interviewed through IDIs highlighted their concerns about what appear to be common trends on digital platforms, particularly growing competition, declining earnings, rising operational costs and a lack of social and safety protections. Many felt that, overall, platform policies and pricing structures favoured customers over workers, and they had no avenues to advocate for themselves. There was widespread consensus among IDI respondents that it was increasingly difficult to earn a stable income compared to previous years, which they attributed primarily to increased competition, which is reducing their daily trip frequency.

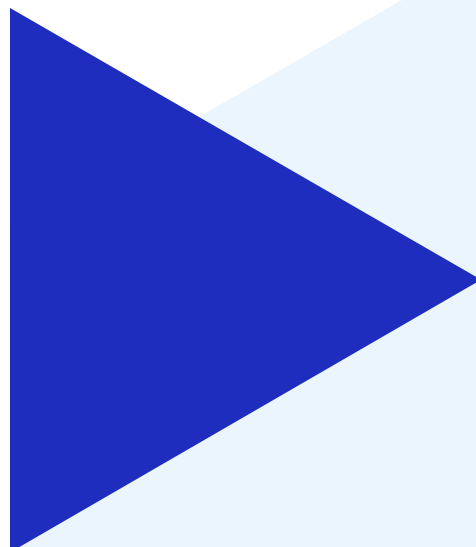
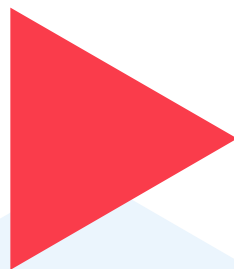
Many respondents noted they would take a more stable job if the opportunity arose, and a few hoped to transition into self-employment or start a small business once financially secure. However, others felt that their lack of skills and resources prevented them from pursuing opportunities outside of platform work. Many workers suggested that both platforms and the Government should focus on improving financial and social security, for example, by increasing fare rates, reducing commission fees, ensuring comprehensive insurance coverage, increasing bonuses and providing more purposeful training.



The company should raise the fare rate or reduce the service fee.... and the government should ensure access to NSSF or social protection for all platform workers.

Platform worker / Tuk-tuk driver

KII respondents expected the industry to continue growing, driven by urbanization, tourism recovery and broader smartphone and digital payment use. Some respondents highlighted drivers of future change in the digital platform economy, including technological advancements (AI, sophisticated algorithms), increased regulation and potential market stratification favouring international platforms. All key informants, including platform operators, government representatives and workers' unions/associations, agreed that additional regulation is needed to protect worker rights and safety, as well as passenger safety. According to the key informants, the most important regulatory change will be appropriately defining platform work to ensure workers are protected under the Labour Law, through clarifying or establishing an employment classification for platform workers. Some respondents also highlighted the need for sector-specific regulations on algorithmic transparency, minimum earnings, working time limits and occupational safety standards.





▶ 4

Conclusions

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1. The digital platform workforce is predominantly young and male.

Digital labour platforms in Cambodia have created significant economic opportunities, attracting a predominantly young and male workforce with the promise of flexibility and higher earnings. The exploratory findings of the study indicate that younger platform workers are more likely to work in the delivery sector. In comparison, older platform workers are concentrated in the ride-hailing industry (tuk-tuks and taxis). Very few women are engaged with platform work, but those who are work mainly in the delivery sector and for smaller local platforms.

Platform work remains relatively new for most workers, with workers averaging 2.1 years on delivery and taxi platforms, and 3.8 years on tuk-tuk platforms. Tuk-tuk drivers and workers on PassApp were more likely to have worked for longer, possibly because PassApp was one of the first platforms in Cambodia and initially provided only ride-hailing services for tuk-tuks. Workers were significantly more likely to choose delivery or taxi platforms over tuk-tuks, with a larger portion of workers on these platforms joining within the previous 12 months (38 per cent of delivery riders and 47 per cent of taxi drivers, compared to 14 per cent of tuk-tuk drivers).

2. Platform workers work extended working hours, sometimes for more than one platform.

Most platform workers worked on only one platform, and delivery riders adhered to this pattern almost exclusively (98 per cent worked on a single platform). Tuk-tuk and taxi drivers were more likely than delivery riders to work across multiple platforms, potentially due to low demand on their initial platform.

Workers worked an average of 6.7 days per week, and 11–12 hours per day, averaging 2.3 hours of waiting time, including between tasks. Delivery riders had the least amount of waiting time, averaging 2.1 hours per day. Most respondents remained connected to applications and responsive to new orders during this time. Across all sectors, platform workers noted the impact of automated systems – including ratings and penalties – on their task allocation and earnings. A large majority of workers on all platform types reported that ratings significantly affected their earnings. In addition, half of all workers had been penalized for not accepting or for cancelling orders, which impacted future job allocation.

3. About half of the platform workers are enrolled in social security, but primarily on a voluntary basis.

Approximately half of the workers surveyed reported being enrolled in social security, with most having voluntary NSSF healthcare coverage, which includes medical care, maternity allowance and funeral grant. Delivery riders were more likely than tuk-tuk or taxi drivers to have compulsory coverage, indicating some positive practices among digital delivery platforms. Indeed, while most taxi and tuk-tuk drivers primarily self-enrol in social security, delivery riders are more likely to be enrolled through platforms. Despite mechanisms for workers to make voluntary contributions, most key informants highlighted the need for regulatory change to appropriately classify the employment relationship of platform workers and ensure mandatory and comprehensive NSSF coverage.

4. Earnings differ across platform types primarily due to disparities in work-related expenses.

While taxi drivers generate the highest gross earnings, their earnings after deducting operational expenses are the lowest due to high operational costs for fuel, repairs and vehicle financing. By contrast, delivery riders, with their lower overheads, retain a greater share of their earnings, making them more likely to cover household expenses sufficiently.

Workers who worked across multiple platforms or held additional jobs (mainly tuk-tuk and taxi drivers) reported higher average earnings, without reporting longer working days per week or more hours per day. Tuk-tuk and taxi drivers were more likely than delivery workers to work across multiple platforms or have additional jobs, and they earned more per month when they supplemented their earnings with non-platform work.

5. Training is provided consistently, but OSH risks and support vary between platform types.

Almost all of the platform workers had received training in safety, use of the digital application and customer service, with training primarily conducted in person.

Across platform workers, delivery riders faced the highest risk of work-related injury, with one third of respondents reporting an injury at work. Available support in the event of accidents or injuries – including accident insurance coverage or support channels – varied between platforms and was exclusive to incidents occurring while performing a task, excluding waiting time or while driving to the pick-up point. Almost all respondents noted that they would be personally responsible for covering costs in the event of an accident or medical emergency.

6. Platform operators mediate complaints and dispute resolution, and workers have limited access to formal representation.

A large majority of platform workers reported they could file a complaint, with most complaints pertaining to technical problems with the application or order/booking issues. Workers who filed complaints, however, were largely unsatisfied with how problems were resolved. While many workers reported membership in informal representative networks, almost none were members of trade unions, reflecting the challenges of trade unionization in the absence of a formal employer–employee relationship. Workers and key informants highlighted that this is a critical gap that leaves workers with minimal power to negotiate fares or commission fees, contest unfair penalties or advocate for their rights.

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Annexes

► Annex 1. Priorities and recommendations of the Tripartite Consultation Workshop

On 3 March 2026, the Tripartite Consultation Workshop on the Diagnostic Study of Working Conditions and Social Security Coverage in Digital Labour Platforms in Cambodia was convened by the ILO to validate the preliminary findings of the draft study and to gather stakeholder input. The workshop identified priorities and formulated recommendations to promote decent work in the platform economy in Cambodia.

The event brought together around 50 participants, including representatives from the Ministry of Labour and Vocational Training; Ministry of Industry, Science, Technology and Innovation; Ministry of Public Works and Transport; Ministry of Economy and Finance; the Cambodian Federation of Employers and Business Associations (CAMFEBA); Cambodian workers' organizations; platform worker representatives; and platform operators.

The summary below reflects the consolidated priorities and recommendations from the tripartite discussions.

What are the key opportunities and challenges of work in the platform economy in Cambodia?

Across government, employers, platform operators, and trade union groups, participants highlighted various opportunities emerging from Cambodia's expanding platform economy. Platforms offer accessible income generation, flexibility in relation to working time and training opportunities on the digital platform. They also foster digital skills development and deeper understanding of digital technologies. Platforms were described as easy to use and beneficial for consumers, with scope for continued growth as technology adoption deepens.

At the same time, stakeholders identified a set of challenges. The most prominent is the absence of a dedicated legal and policy framework, resulting in unclear employment status, gaps in protection and uneven access to social security. Groups also pointed to high operational costs and fee structures that can reduce earnings. Competition among a multitude of platform operators and difficulties matching customer demand with available drivers are additional challenges.

Participants also underlined limited worker voice and weak representation, with no formal associations for either platform workers or operators and a lack of recognition under existing tripartite mechanisms. Additional concerns include OSH and stress-related risks, gaps in foreign language skills and digital literacy, and a lack of transparency in platform rules and responsibilities.

How can social dialogue among the Government, social partners and platform operators contribute to sustaining the long-term growth of the sector?

Stakeholders agreed that stronger structured social dialogue is essential to steer the platform economy towards sustainable and inclusive development. Central to this end is a clear legal and policy framework – particularly as platform work remains outside the scope of current labour legislation – that must be reinforced by multi-stakeholder engagement across government ministries, platform operators, employers and workers. Such dialogue can also promote mutual understanding between platform workers and operators, helping to reduce disputes and improve overall service quality.

Dialogue mechanisms were seen as important for addressing immediate issues related to working conditions, including access to social protection, notably the NSSF, and the development of appropriate dispute resolution mechanisms. Ensuring that platform workers and their representatives are formally recognized within dialogue structures is also viewed as essential. Through these channels, stakeholders believe the sector can strengthen professional standards, enhance service delivery, build trust among users and investors, and foster long-term growth.

What are the priorities that stakeholders view as key to promoting decent work in the platform economy in Cambodia?

Stakeholders converged around several key priorities to advance decent work in the platform economy.

- First, both the government and workers groups called for the development of a legislative framework appropriate for regulating platform work.
- Second, expanding social protection coverage was also highlighted by both government and workers groups. In addition, the workers group specifically emphasized the need to simplify registration processes, for example through CAM-IE,¹⁷ to ensure platform workers can access social security benefits. They also prioritized the need to expand NSSF benefits beyond voluntary health insurance to include work injury and pension schemes.
- Third, the government group identified a priority to integrate standards on decent working conditions and OSH for platform work.
- Finally, the group of employers and platform operators called for greater transparency in setting service fees and to support increases in the daily earnings of platform workers.

Taken together, these priorities form a robust agenda for further dialogue towards improving working conditions, strengthening protections and supporting the sustainable growth of Cambodia's platform economy.

¹⁷ CAM-IE is an online platform where informal business can register and access services. It is accessible through mobile app, web portal and (importantly) partner bank branches nationwide. As of July 2025, the platform had received nearly 120,000 applications (ILO 2025a).

► Annex 2. Survey questionnaire

PLATFORM WORKERS

[September 2025]

Version: **FINAL**

Interviewer:	Date and time stamp:	
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Informed consent

Thank you for agreeing to talk with me today. I'd like to introduce myself – I am **(NAME)** from **(ORGANIZATION)**.

We are conducting research among platform workers in the delivery and transport sectors on behalf of the International Labour Office (ILO) under the United Nations. It would be very helpful if you could share information about your most recent experience. There are no right or wrong answers, so please give us your honest opinion. Any information collected from you will be kept strictly confidential. We will not use your name, address, or any other personal information by which you could be identified. Your participation in the interview is voluntary, and you can withdraw at any time.

Do you have further questions about this survey? **CLARIFY AND CONFIRM UNDERSTANDING**

Do you understand and give your consent to be interviewed for the study? **IF YES CONTINUE**

Screening

S1 - Record district (SA)

- | | |
|-----------------------------------|--------------------------------------|
| ☐ Mean Chey | ☐ Chroy Changvar |
| ☐ Pou Senchey | ☐ Doun Penh |
| ☐ Prek Pnov | ☐ Tuol Kouk |
| ☐ Sen Sok | ☐ Prampir Makara |
| ☐ Chbar Ampov | ☐ Chamkar Mon |
| ☐ Dangkao | ☐ Kamboul |
| | ☐ Russey Keo |

S2 - Record type of worker (SA)

- | | |
|--------------------------------|----------------------------|
| ☐ Delivery | ☐ Taxi |
| ☐ Tuk-tuk | |

S3 - Record sex (SA)

- ☐ Male
 ☐ Other
- ☐ Female

S4 - How old are you?► **IF UNDER 18 STOP****S5 - How many years and months have you worked as a platform worker?**► **IF LESS THAN THREE MONTHS, ASK S6****S6 - Have you returned from Thailand after 24 July 2025?**

- ☐ Yes ► **RECRUIT FOR IDI**
☐ No ► **STOP**

A. Employment and access to work**A1 - Do you work for one or more than one platform?**

- ☐ One ► **GO TO A2b**
☐ More than one ► **CONTINUE**

A2a - Which platforms do you work for? (MA)

- | | |
|---|--|
| ☐ Grab ► CONTINUE | ☐ Move ► GO TO A4 |
| ☐ PassApp ► GO TO A4 | ☐ Maxim Cambodia ► GO TO A4 |
| ☐ WowNow ► GO TO A4 | ☐ E-GET ► GO TO A4 |
| ☐ OTO ► GO TO A4 | ☐ Wing Mall ► GO TO A4 |
| ☐ Zippy ► GO TO A4 | ☐ Food Panda ► GO TO A4 |
| ☐ TADA Cambodia ► GO TO A4 | ☐ Other (SPECIFY) ► GO TO A4 |

A2b - Which platform do you work for most in terms of number of hours (SA)

- | | | | |
|-------------------------------------|-------------------|--|-------------------|
| ☐ Grab | ► CONTINUE | ☐ Move | ► GO TO A4 |
| ☐ PassApp | ► GO TO A4 | ☐ Maxim Cambodia | ► GO TO A4 |
| ☐ WowNow | ► GO TO A4 | ☐ E-GET | ► GO TO A4 |
| ☐ OTO | ► GO TO A4 | ☐ Wing Mall | ► GO TO A4 |
| ☐ Zippy | ► GO TO A4 | ☐ Food Panda | ► GO TO A4 |
| ☐ TADA Cambodia | ► GO TO A4 | ☐ Other (SPECIFY) | ► GO TO A4 |

A3 - Are you a qualified GrabRent Driver? TUK TUK AND TAXI ONLY

- ☐ Yes ☐ No

Show card 1**A4 - How did you get the job with [PLATFORM]? (MA)**

- | | |
|---|--|
| ☐ Directly from the platform app or website | ☐ Job agency |
| ☐ Social media advertisement | ☐ Service centre |
| ☐ Referral from friends or family | ☐ Other (SPECIFY) |

Show card 2**DW7 - Which of the following best describes your job with [PLATFORM]? (SA)**

- | | |
|--|--|
| ☐ Independent contractor | ☐ Temporary worker |
| ☐ Self-employed | ☐ Daily worker (Casual worker) |
| ☐ Freelancer | ☐ Other (SPECIFY) |
| ☐ Regular employee | |

Show card 3

A6 - Why did you choose to work for [PLATFORM]? (MA)

- | | |
|--|---|
| ☐ Could not find other jobs | ☐ The job provides flexibility to manage my work schedule |
| ☐ To complement other income | ☐ Pay is better than in other jobs |
| ☐ To earn money while studying | ☐ Other (SPECIFY) |

A7 - After signing up, did you receive any training arranged by [PLATFORM]? (MA)

- | | | | |
|--------------------------------------|-------------------|--------------------------|-------------------|
| ☐ Yes, online | ► CONTINUE | ☐ No | ► GO TO A9 |
| ☐ Yes, in person | ► CONTINUE | | |

Show card 4

DW1* - What was covered in the training? (MA)

- | | |
|---|---|
| ☐ Safety (e.g. traffic rules, wearing helmets) | ☐ Conditions for App deactivation |
| ☐ Customer service (e.g. how to behave towards customers) | ☐ How to use the app |
| ☐ Dress code | ☐ How to contact the call centre |
| ☐ How to obtain bonus pay | ☐ Other (SPECIFY) |

A9 - Besides platform work, do you currently have any other job?

- | | | | |
|---------------------------|-------------------|--------------------------|-------------------|
| ☐ Yes | ► CONTINUE | ☐ No | ► GO TO B1 |
|---------------------------|-------------------|--------------------------|-------------------|

Show card 5

A10 - Which of the following best describes your other job? (MA)

- | | |
|--|--|
| ☐ Employed full time | ☐ An owner or partner in a business (without paid employees) |
| ☐ Employed part time | ☐ An owner or partner in a business (with paid employees) |
| ☐ Self employed or farming | ☐ Other (SPECIFY) |
| ☐ Other contract work | |

A11 - Do you have a written contract for that job?

- | | |
|---------------------------|--------------------------|
| ☐ Yes | ☐ No |
|---------------------------|--------------------------|

A12 - How many hours per week do you work in this job?**A13 - How much money per week or month do you earn in this job, in USD?**

	Week		Month
--	------	--	-------

A14 - Does most of your total employment-related income come from this job or platform work?

- | | |
|---------------------------------|-------------------------------------|
| ☐ Other job | ☐ Platform work |
|---------------------------------|-------------------------------------|

B. Rating and penalties**B1 - Do you get a rating when working with [PLATFORM]?**

- | | |
|---|--|
| ☐ Yes ► CONTINUE | ☐ Don't know ► GO TO B5 |
| ☐ No ► GO TO B5 | |

B2 - Do you know your current rating with [PLATFORM]?

- | | |
|---------------------------|--------------------------|
| ☐ Yes | ☐ No |
|---------------------------|--------------------------|

Show card 6

B3 - Does your rating affect any of the following? (MA)

- | | |
|--|---|
| ☐ The number of requests received | ☐ Warnings from the platform |
| ☐ Getting long-distance trips | ☐ Penalties from the platform |
| ☐ Matching with higher-paying customers/
orders | ☐ Other (SPECIFY) |
| ☐ Work in better locations | ☐ Don't know |
| ☐ Priority in job allocation | ☐ No |

B4 - How significant is the impact of the rating on what you can earn?

- | | |
|--|--|
| ☐ Very significant | ☐ Not very significant |
| ☐ Somewhat significant | ☐ Don't know |

B5 - Can you get a penalty if you refuse orders or ride bookings? (SA)

- | | |
|---|--|
| ☐ Yes ► CONTINUE | ☐ Don't know ► GO TO B7 |
| ☐ No ► GO TO B7 | |

Show card 7

B6 - What penalties can you get? (MA)

- | | |
|--|---|
| ☐ Temporary suspension | ☐ Lose priority in job allocation |
| ☐ Warnings from the platform | ☐ Lose access to incentives |
| ☐ Less favourable profile on the App | ☐ Wait longer for bookings |
| ☐ Get fewer bookings | ☐ Other (SPECIFY) |

B7 - Has your account ever been suspended by [PLATFORM]?

- | | |
|---|---|
| ☐ Yes ► CONTINUE | ☐ No ► GO TO DW4 |
|---|---|

B8 - What was the reason? (SA)

☐ High cancellation rate	☐ Technical problem with the app
☐ Violation of company policy	☐ Other (SPECIFY)
☐ Consistent low customer ratings	☐ Don't know
☐ Customer complaints	

	Days
	Weeks
	Months

DW4* - How many days per week do you normally work with [PLATFORM]? (SA)

[illegible]

C3 - How many hours per day do you normally stay waiting for work?

	Week		Month
--	------	--	-------

C4a - How many days per week do you normally work with other platforms? (SA)

1	2	3	4	5	6	7
☐	☐	☐	☐	☐	☐	☐

Days per week

C4b - How many hours per day do you normally work with other platforms including rest and waiting for work?

C4c - How much money do you normally earn each week or month, including tips and bonuses with other platforms, in USD?

	Week		Month
--	------	--	-------

► **Ask all**

C5 - How much of your total platform income is from tips from customers, in USD?
RECORD THE TOTAL FROM ALL PLATFORMS. IF NONE PUT ZERO

C5a -How are you paid for by [PLATFORM]? (SA)

- ☐ Fixed salary ► **GO TO C6 AND SKIP C8**
☐ Other (**SPECIFY**) ► **CONTINUE**
- ☐ Paid per booking or per ride ► **CONTINUE**

C5b - Can you transfer and withdraw your earnings anytime from [PLATFORM]? (SA)

- ☐ Yes
 ☐ No (**SPECIFY**)

Show card 9

C6 - How often are you paid for your work with [PLATFORM]? (SA)

- ☐ I can withdraw funds any time
 ☐ Every 2 weeks
- ☐ Daily
 ☐ Monthly
- ☐ Weekly
 ☐ Other (**SPECIFY**)

Show card 10

C7 - How do you usually obtain your payments from [PLATFORM]? (SA)

- ☐ Bank transfer
 ☐ Cash
- ☐ Mobile wallet / App account
 ☐ Other (**SPECIFY**)
- ☐ Prepaid card

C8 - Does [PLATFORM] take a commission fee or is a commission fee deducted by [PLATFORM] stores, or restaurants?

- ☐ Yes ☐ No

C9 - Do you pay any fees when receiving or withdrawing your earnings from [PLATFORM]? (MA)

- ☐ Yes, when receiving ☐ No
☐ Yes, for withdrawal ☐ Don't know

Show card 11**C10 - How can you earn additional bonus pay from [PLATFORM]?**

- ☐ Reaching certain targets ☐ Working on public holidays
☐ Working during rush hours ☐ Working in the rain
☐ Working in certain areas ☐ When joining the platform
☐ Working late at night ☐ Other (**SPECIFY**)
☐ Working early mornings ☐ Don't know ► **GO TO C13**
☐ Working on weekends

C11 - How often are you able to earn such bonuses? (SA)

- ☐ Never ☐ Often
☐ Sometimes ☐ Always

Show card 12**C12 - On average, how much of your income is made up from bonus pay? (SA)**

- ☐ Less than half ☐ More than half
☐ About half

C13 - How often do you experience cancelled orders or ride bookings? (SA)

- ☐ Never
 ☐ Regularly
- ☐ Seldom
 ☐ Often

C14 - In case of a cancellation, does [PLATFORM] compensate you? (SA)

- ☐ Yes
 ☐ Don't know
- ☐ No

C15 - Is your current income from [PLATFORM] enough to cover all your household expenditures and financial obligations? (SA)

- ☐ Not enough
 ☐ More than enough
- ☐ Just enough

D. Social security**Show card 13****DW11* - Are you currently enrolled in any government or private sector benefit scheme? (MA)**

- | | | | |
|--|-------------------|--|-------------------|
| ☐ National Social Security Fund (NSSF) | ► CONTINUE | ☐ Company or company group insurance | ► GO TO D3 |
| ☐ Accident insurance | ► GO TO D3 | ☐ Other (SPECIFY) | ► GO TO D3 |
| ☐ Health Equity Fund (HEF) | ► GO TO D3 | ☐ No | ► GO TO D4 |
| ☐ Private health insurance | ► GO TO D3 | | |

Show card 14**D2 - In which scheme are you enrolled? (MA)**

- ☐ Mandatory NSSF member, full coverage
 ☐ Don't know
- ☐ Voluntary NSSF member with health care scheme only

Show card 15

D3 - Who enrolled you? (SA)

- | | |
|--|--|
| ☐ Current platform | ☐ Myself |
| ☐ Other employer | ☐ Other (SPECIFY) |

Show card 16

D4 - If you had an accident or fell sick while working and you needed medical treatment, who would pay for the medical fees? (SA)

- | | |
|---------------------------------------|--|
| ☐ Myself | ☐ I would not receive any medical care |
| ☐ My family | ☐ The Platform |
| ☐ Insurance | ☐ Don't know |
| ☐ Social security | |

E. Dispute resolution**E1 - Does [PLATFORM] have a process where you can seek help or file a complaint if you have a problem at work? (SA)**

- | | |
|---|--|
| ☐ Yes ► CONTINUE | ☐ Don't know ► GO TO F1 |
| ☐ No ► GO TO F1 | |

E2 - Did you ever use the service?

- | | |
|---|--|
| ☐ Yes, to seek help ► CONTINUE | ☐ No ► GO TO F1 |
| ☐ Yes, to complain ► CONTINUE | |

Show card 17

E3 - What was the issue about? (MA)

- | | |
|---|--|
| ☐ Technical problems with the app | ☐ Payment issues |
| ☐ Issue with order/booking | ☐ Work-related accident or injury |
| ☐ Issue with location | ☐ Was victim of a robbery or other crime |
| ☐ Cancelled orders or rides | ☐ Conflict with customers |
| ☐ Customer forgot something | ☐ Other (SPECIFY) |
| ☐ Conflict with product providers
(restaurant, merchant, etc.) | |

E4 - How often are these matters resolved? (SA)

- | | |
|------------------------------|---------------------------------|
| ☐ Never | ☐ Regularly |
| ☐ Seldom | ☐ Often |

F. Expenses**F1 - Do you own your own vehicle, rent it or borrow for free? (SA)**

- | | |
|--|--|
| ☐ Own ► ASK F3 & F4 | ☐ Borrow ► GO TO F5 |
| ☐ Rent ► ASK F2 | |

F2 - How much is the rent per month?**F3 - How much did you pay for it?****F4 - Did you borrow money to pay for it?**

- | | |
|---------------------------|--------------------------|
| ☐ Yes | ☐ No |
|---------------------------|--------------------------|

Show card 18

F5 - Which of the following have you had to buy yourself to work for [PLATFORM]? (MA)

- | | |
|---------------------------------------|--|
| ☐ Uniform | ☐ Helmet |
| ☐ Backpack or bag | ☐ Other (SPECIFY) |
| ☐ Cooler bag | ☐ Not applicable ► GO TO F7 |
| ☐ Phone | |

F6 - How much did you pay for them in total, in USD?

F7 - How much money do you normally spend per week on fuel?

F8 - How much is your monthly mobile phone cost?

F9 - How much did you pay for vehicle repairs in the past year? IF NONE, PUT ZERO

F10 - How much did you pay for vehicle registration and insurance last time? IF NONE, PUT ZERO

Show card 19

F11 - Does [PLATFORM] help to pay for any of these costs? (MA)

- | | |
|-------------------------------|------------------------------------|
| ☐ Fuel | ☐ Registration |
| ☐ Phone | ☐ Insurance |
| ☐ Repairs | ☐ No |

G. OSH and FPRW

DW10* - Have you ever had a work-related injury when working for [PLATFORM]?

- | | |
|---------------------------|--------------------------|
| ☐ Yes | ☐ No |
|---------------------------|--------------------------|

Show card 20

G2 - What occupational safety and health facilities does [PLATFORM] provide? (MA)

- | | |
|---|--|
| ☐ First aid kit | ☐ Annual medical check-up |
| ☐ Medical staff | ☐ Other (SPECIFY) |
| ☐ Nursing room | ☐ None |
| ☐ Safety and health officer | |

Show card 21

G3 - Which of the following does [PLATFORM] provide, if any? (MA)

- | | |
|---|--|
| ☐ Helmet | ☐ Phone bracket |
| ☐ Protective clothing | ☐ Other (SPECIFY) |
| ☐ Cooler box | ☐ None |

Show card 22

DW12* - Are you a member of any groups or associations representing platform workers? (SA)

- | | |
|---|--|
| ☐ Yes, informal network (social media or chat groups) | ☐ Yes, trade union |
| ☐ Yes, association or cooperative | ☐ No |

DW9* - Have you been subject to any discrimination when working for [PLATFORM] because of sex, age, religion, or other characteristics?

- | | |
|---------------------------|--------------------------|
| ☐ Yes | ☐ No |
|---------------------------|--------------------------|

Show card 23

G4 - What aspects of your job make you feel stressed, if any? (MA)

- | | |
|--|--|
| ☐ Achieving ride/delivery times | ☐ Unclear payment terms |
| ☐ Maintaining a high customer rating | ☐ No clear system for raising concerns with the platform |
| ☐ Long work hours | ☐ Unhealthy work environment |
| ☐ Order or booking cancellations | ☐ Being deactivated or suspended from the platform |
| ☐ Not earning enough money | ☐ Other (SPECIFY) |
| ☐ Risk of having an accident | ☐ None |
| ☐ Customers complaints | |

H. Demographics

Show card 24

H1 - What is the highest level of education you have attained? (SA)

- | | |
|---|---|
| ☐ Never attended school | ☐ Secondary Diploma |
| ☐ Pre-school | ☐ Technical or vocational diploma |
| ☐ Primary school | ☐ A university degree or higher |
| ☐ Secondary school | |

H2 - Are you married?

- | | |
|---------------------------|--------------------------|
| ☐ Yes | ☐ No |
|---------------------------|--------------------------|

H3 - Do you have children?

- | | |
|---------------------------|--------------------------|
| ☐ Yes | ☐ No |
|---------------------------|--------------------------|

H4 - How many people live in your household, including yourself?

X. Contact information (all)

X1 - You have been selected for an extension interview and we would like to contact you at a separate time and ask you just a few more questions. Do you agree to participate?

☐ Yes ► **CONTINUE**

☐ No ► **THANK YOU FOR YOUR TIME**

Trigger questions: (S6=1, B7=1, DW5, DW9, F4=1, E4=1, DW11=2,3,4,5)

X2 - In case I have missed anything, what mobile number I can reach you on?

► **CONFIRM NAME AND DO A MISSED CALL TO CHECK**

First name	
Mobile number	

► Annex 3. In-depth interview moderator guide

IDI MODERATOR GUIDE

[September 2025]

Version: **FINAL**

Respondent full name:	Location:	
Date: _____ / _____ / 2026	Time began:	Time ended:

Declaration

I confirm that I have checked that the moderator guide was carried out in accordance with the instructions supplied to me for this research. I understand that the information given to me during the interview must be kept confidential.

Signed by moderator:

Introduction

I am (NAME) from (Rapid Asia Co., Ltd). You recently did our survey and agreed to participate in this follow-up interview. It will be very helpful to hear about your view, opinion, and insights on platform delivery services in Cambodia. We really appreciate you giving us your time today.

I will record our discussion so I can concentrate on what you are saying. There are no right or wrong answers, so please give us your honest opinion. The recording will only be used for internal processing purposes. Your record will not be shared with anyone.

Please be assured that anything you say is confidential and your participation is completely voluntary, you can withdraw at any time. Do you have further questions about this interview? (**MAKE CLARIFICATION AS NEEDED**).

Do you understand and give your consent to be interviewed? **IF YES CONTINUE.**

Summary of trigger questions:

- (1) Questionnaire ref: S6 = 1(Returnee)
- (2) Questionnaire ref: DW5* (Mixed long hours, and <8)
- (3) Questionnaire ref: F4
- (4) Questionnaire ref: DW9*
- (5) Questionnaire ref: E6 = 11,13

Employment

1. I would like to ask you about how you started working on the platform.

- Why did you decide to start working with this platform?
 - **Probe:** Did you start working to gain an income, or earn an extra income, or do you have another reason?
- How did you join the platform?
 - **Probe:** Did you register directly through the app, visit a service centre, get referred by another worker, or use a broker/agent?
 - **Probe:** What documents do you need to submit to join the platform?

- When you first started, what initial start-up costs did you have?
 - **Probe:** For example, buying or upgrading a motorcycle or bicycle, getting a smartphone, paying registration or activation fees, buying safety equipment, or arranging mobile data.
- Did you receive any financial or non-financial support to help you start? By whom?
 - **Probe:** For example, from the platform, other workers, NGOs, or associations, such as help with registration fees, vehicle purchase, fuel vouchers, training, or safety gear.
- What kind of support (this includes all types of support, not just financial support), including government support, do you think would make it easier for new workers to start work on the platform?

For people who work more than two jobs

- **What kind of job are they doing and if it is the other platform work**

Expenses and working time

1. I would like to ask you about your expenses related to platform work.

- What are the main costs you have for doing this work?
 - **Probe:** For example, fuel, vehicle maintenance or repairs, mobile data, platform service fees, protective equipment, fines or penalties.
- What do you do while waiting for tasks? Can you run private errands or work on your other jobs? (if any) When waiting for orders or rides, are you aware if this waiting time is paid?

Migration and access to work

1. I would like to ask you about your experiences with migration and access to work.

- Can you tell me where you are from and how you came to work on this platform? If you moved here from another province, what influenced your decision to come and work in this city?

For Returnees from Thailand?

- Can you share your journey into platform work, how you first heard about it and what motivated you to start?
- For those who worked abroad, how does your current platform work compare with your past work experience outside Cambodia?
- What kinds of challenges do returnees or migrants face when entering or doing platform work?
- In what ways are the experiences of returnees or migrants different from those of local workers?
- If you could change one thing to make platform work better for returnees or migrants, what would that be?

ALL

- How did you first find out about this work and get started?
- Can you describe a typical day in your platform work, including the hours that you work and the pay you earn?
- How stable is your income?
- How easy or difficult is it to get orders or rides in this platform?
- Can you describe any difficulties that you or other returnees experience when starting platform work?
- In your view, are their working conditions different from those of local workers? How so?
- Does being a returnee from Thailand, or a migrant, make it more challenging for you to perform in your platform work? IF YES, in what ways?
- What challenges or difficulties do you face in this work?
- When problems arise, where do you as migrants/returnees usually seek help?
- How does your current work compare to your previous work in Thailand, in terms of pay, working hours, and benefits?
- What could make access to platform work easier and fairer for returnees or migrants?

OSH and FPRW

1. I would like to ask you about your experience with (any type of) discrimination while working on the platform.

- What types of discrimination have you experienced while working with the platform or interacting with customers?
 - **Probe:** Did it relate to gender, age, religion, nationality, race/ethnicity, platform ratings, or something else?
- Did you seek remedy from the platform management, customer service, or an external body (e.g., driver/delivery association, NGO)? **YES NO**
 - **Probe: IF YES** and through platform, how did it respond to the issue?
 - **Probe: IF YES** and through platform, to what extent was the issue resolved?
 - **Probe: IF YES** and through external body, how did it respond to the issue?
 - **Probe: IF YES** and through external body, to what extent was the issue resolved?
 - **Probe: IF NO**, what was the reason for not seeking remedy?
- What measures do you think your platform could take to prevent workplace discrimination?

2. I would like to ask you about your experience with communication, feedback, or negotiation with the platform.

- Have you ever been involved in any form of communication or feedback with the platform's management? This could be through in-app messages, customer service calls, driver/delivery partner meetings, online forums, or surveys. **YES NO**
 - **Probe: IF YES**, what did it mainly relate to? (e.g., problems with customers such as disputes, harassment, or cancellations; incorrect fares or commission payments; bonuses or incentives; account suspension or deactivation; access to trips or delivery orders, including peak-hour demand; platform rules or policies; safety or insurance claims; or other matters).
 - **Probe: IF NO**, who usually represents or speaks on behalf of platform workers? (e.g., driver or delivery partner associations, informal worker networks, social media or chat groups, community leaders, or other representatives).
- How did the platform respond to workers' requests, complaints, or feedback?
 - **Probe:** To what extent was the issue resolved, changes made, or agreement reached?
- What particular aspects were effective in communications, feedback or problem-solving between workers and the platform? Conversely, what suggestions do you have for improvement?

3. I would like to ask you about your experience with safety, health, and well-being while working on the platform.

- What types of work-related accidents, injuries, or health issues have you experienced while working?
 - **Probe:** For example, road accidents, injuries from lifting or carrying items, heat stress, or long working hours.
 - **Probe:** Did you seek medical attention? If so, what were the costs of treatment?
- What kinds of safety guidelines, training, or equipment (like helmets or protective clothing) does the platform provide, if any? **YES NO**
 - **Probe: IF ANY**, how useful are they in practice?
- What do you think are effective and helpful measures by the platform regarding safety, health, and well-being for platform workers? Conversely, what are your suggestions for improvement?

Future career

1. I would like to ask you about the future of your work

- ▶ What do you see as the main challenges in your work?
 - **Probe:** For example, low income, high expenses, safety risks, health issues, problems with customers, unfair treatment by the platform, lack of benefits, lack of career progression, lack of training or other reasons.
- ▶ To what extent do you think it is becoming harder to get enough trips or deliveries to earn a stable income?
 - **Probe:** Can you give examples? (e.g., fewer orders, more drivers/riders joining the platform, account deactivation, changes in platform rules or incentives).
- ▶ What steps has the platform taken to address or prepare for these challenges?
- ▶ If these issues were improved or resolved, would you consider continuing to work on the platform?

YES	NO
• IF YES, why	• IF NO, why not?
- ▶ What have you done or planned to do to prepare for your future work situation?
- ▶ What suggestions do you have for improving the long-term security and sustainability of platform work?
- ▶ Probe: What should the governments do to improve the long-term security and sustainability of platform work?
- ▶ Probe: What should platform operators do to improve the long-term security and sustainability of platform work?

THANK YOU FOR YOUR COOPERATION

► Annex 4. Key informant interview moderator guide

IDI MODERATOR GUIDE

[September 2025]

Version: **FINAL**

Respondent full name	Location:	
Date: _____ / _____ / 2026	Time began:	Time ended:

Declaration

I confirm that I have checked that the moderator guide was carried out in accordance with Rapid Asia's guidelines and instructions supplied to me for this research. I understand that the information given to me during the interview must be kept confidential.

Signed by moderator:

Objectives

- to explore the challenges and opportunities related to work on digital platform delivery/ride-hailing services in Cambodia.
- to explore the policy and regulatory priorities in the Cambodian digital platform delivery/ride-hailing services.

Target groups

- Digital platform operators
- Government authorities
- Other industry stakeholders, including NGOs, CSOs, and workers' unions

Introduction

Thank you for spending the time talking with me today. I am (NAME) from Rapid Asia Co., Ltd, a social and development consulting firm based in Bangkok, Thailand.

We are currently undertaking the research and analysis on '**Diagnostic on Working Conditions and Social Protection Coverage in Digital Labour Platforms in Cambodia.**' The research is commissioned by the International Labour Organization (ILO). As part of the research, it will be very helpful to hear about your thoughts and experiences.

I will record this interview so I can focus on the discussion. There is neither right nor wrong answer, so please give us your honest opinion. The recording will only be used for internal processing purposes. What you provide will not be shared with anybody except people from our research team.

The information we collect will be aggregated and summarized in a research report. Anything you contribute is confidential, and your participation is completely voluntary. You can withdraw at any time or choose not to respond to some questions. Do you have any questions? **(MAKE CLARIFICATION AS NEEDED)**

Do you understand and give your consent to be interviewed? **IF YES CONTINUE**

Warm-up questions

Ask all

- Could you tell me a bit about what your organization does?
- What is your position, and your role in this organization?

Recruitment

Ask all

- How does platform work contribute to Cambodia's economy and job creation?
- Do you have migrant workers registered on your platform? **YES NO**
 - **IF YES**, what proportion of your workforce do they represent?

Ask government officials only

- How can the government ensure that the recruitment process of platform workers is transparent and fair?

Migration and access to work

Ask government officials only

- How do labour, migration, and work permit policies affect migrant workers' ability to participate in digital platform jobs?
- In what ways do technology and digital economy policies influence migrant workers' access to platforms (e.g., requirements for SIM registration, digital IDs, or online payment systems)?
- What challenges do government authorities face in protecting migrant workers in the digital platform sector?
- What kinds of reforms or support measures could improve migrant workers' access to fair and safe platform work?

Ask all

- What are the main barriers migrant workers face when seeking platform work in Cambodia (e.g., administrative, financial, social, technological)?
- In your opinion, how does migration shape the digital platform labour market in Cambodia?
- What opportunities do you see for improving migrant workers' access to digital platform jobs and ensuring they are treated fairly?

Training

Ask all

- What training do you think will be helpful for platform workers in the future? Could you explain why they are helpful?

Regulation and policy

- How do you manage disputes or complaints raised by the platform workers regarding pay, working conditions, or platform rules?
- Is there a specific person in the company that platform workers can reach out to when they are in distress or want to make a complaint? **YES NO**
 - **IF YES**, how easy is it for platform workers to access this person?
 - **IF YES**, are these disputes resolved by human review, automatic computer systems, or both?

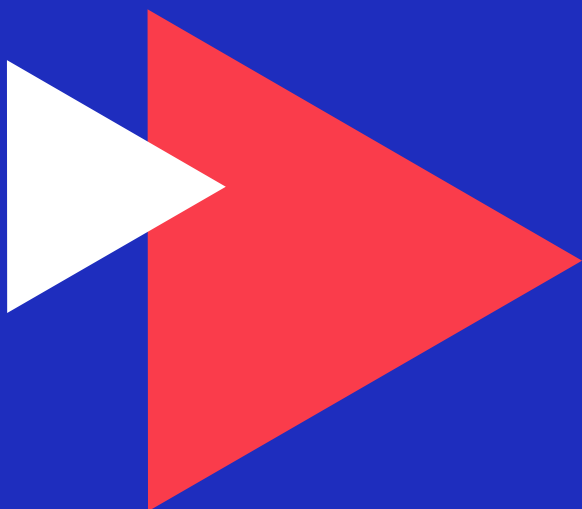
Ask government officials only

- What policies or regulations are currently in place to protect the rights of platform workers, particularly around social security, insurance, or benefits?
- How does the National Labour Law protect the rights and ensure fair treatment of platform workers?
- What are the most urgent labour protection issues that need to be addressed in this industry?
- Do you know how many digital labour platforms are currently registered in your country?
- Do you know how many platform workers who work for platforms are registered in the National Social Security Fund? **YES NO**
 - **IF YES**, can you provide the statistics (or an estimate)?
 - **IF NO**, why? Are they not recorded or categorized differently?
- Is there any initiative to encourage the process of formalizing platform workers? **YES NO**
- What are some of the challenges of convincing platform operators to register their platform workers in the National Social Security Fund?
- How well do you think platform operators implement the national occupational and health safety (OSH) measures to protect platform workers against work-related accidents and illnesses?
- What are the main challenges government authorities face when trying to enforce the national labour law, occupational health and safety practices, and other government regulations in the digital platform delivery/ride-hailing services?
- How do you coordinate with other ministries or agencies on issues related to digital platform work?
- What else should be done to improve the compliance of platform operators with the laws and regulations?

Ask all

- How do you think the digital platform delivery/ride-hailing services industry in Cambodia will change in the next 2 to 4 years?
- What are the challenges and opportunities you see for this industry?
- Do you think that this industry needs to be more regulated? **YES NO**
 - **IF YES**, why
 - **IF NO**, why not?
- How should laws and policies change to align with the changes in this industry?

THANK YOU FOR YOUR COOPERATION



International Labour Organization

ILO Joint Projects Office
Phnom Penh Center
Building D, 1st Floor
Corner of Preah Sihanouk and Sothearos Boulevard
Phnom Penh, Cambodia 12301

T: +855 23 220 817
T: +855 23 216 044
E: phnompenh@ilo.org