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New Work, Data and Inclusion in the Digital Economy:
A Middle East and North Africa (MENA) Perspective



PLATFORM WORKERS: A MOROCCO CASE STUDY



CONTENTS

I. INTRODUCTION	3
1. <i>Context</i>	3
II. OVERVIEW OF PLATFORM WORK IN MOROCCO	5
1. <i>Legal Landscape</i>	6
2. <i>Different Types of Platforms Available</i>	7
3. <i>Methodology and platform workers' experiences in Morocco</i>	10
III. CHARTING A PATH FORWARD	13
1. <i>Policy Recommendations</i>	13
2. <i>Global Lessons</i>	14
IV. CONCLUSIONS	17

I. INTRODUCTION

This research paper is based on research conducted by the Solidarity Center in collaboration with the Union Marocaine du Travail (UMT), funded by the National Endowment for Democracy (NED). The research was conducted by Dr. Mohammad Tariq, a professor of social law at the University of Hassan II Casablanca, and by the Solidarity Center's Strategic Research Department. The purpose of the research was to explore whether platform workers in Morocco are "organizable" and what it would take for the UMT to organize platform workers, as well as to better understand pathways of worker resistance.¹ Platform workers in Morocco, much like most of the world, are not classified as "workers" by employers or by governments, nor are they recognized as such in data. Therefore they do not have full access to social benefits. Unionization can help them negotiate for their rights and can make more data on platform workers available.

In order to explore whether platform workers in Morocco are organizable or not, the Solidarity Center and the UMT needed to assess the state of platform work in Morocco first. As this is an emerging area of economic research and this research into platform work in Morocco is the first of its kind, the paper first situates platform work in a global context, then gives an overview of the platform economy in Morocco before exploring the legal landscape governing platform work in Morocco. The paper then takes a deeper dive into platform work in Morocco, including the various companies

operating in the sector, as well as the lived experience of workers in the largest platform company in Morocco. It concludes with policy recommendations that promote economic inclusion to support access to social protections for platform workers.

1. Context

Eric Tucker defines platform-mediated work as the "digital intermediation between workers and buyers of labor service."² Tucker makes a further distinction between platform-mediated ground work, which "involves the provision of local services such as transportation and food delivery to consumers" and platform-mediated cloud work, which "involves the provision of online services to business clients."³ This research paper is primarily concerned with platform-mediated ground work.

The platform economy in Morocco can be positioned in a broader context where precarious work is a significant issue. Over 70 percent of Morocco's labor market operates in the informal economy, the highest in percentage in the Middle East and North Africa (MENA) region, according to the World Bank.⁴ Morocco has the highest rate of shadow economy employment and some of the lowest female labor force participation in the world. Morocco's High Commission for Planning found that more than half of the workers in Morocco (55.2 percent) have no contract with their employer and less than a

1 Eric Tucker, "Towards a political economy of platform-mediated work," *Studies in Political Economy* (2020), 101:3, 185-207, DOI: 10.1080/07078552.2020.1848499

2 *ibid.*

3 *ibid.*

4 "Informality and Inclusive Growth in the Middle East and North Africa." Overview booklet, *Middle East and North Africa Development Report*, World Bank, Washington, DC.



quarter (24.7 percent) of the workforce employed in Morocco has work-related medical insurance.⁵ Morocco has a relatively high unemployment rate (12.4 percent), according to the High Commission for Planning. Unemployment in Morocco's urban areas is more than 3.5 times higher than rural areas (16.3 percent compared to 5.7 percent).⁶ Unemployment for college graduates and workers aged 25–34 both hover around 18 percent. Exacerbating the unemployment problem is that the government has reduced spending since 2015 by cutting public sector jobs and subsidies. This has pushed many young Moroccans to look for precarious jobs in the informal sector, despite having university degrees.

Although there are no official figures on the number of self-employed, fixed-term contract and temporary agency jobs in Morocco, Moroccan unions report an increase in these forms of employment.⁷ The rise of precarious employment is also evidenced by figures showing that the number of temporary workers benefiting from social security system coverage doubled between 2008 and 2013.⁸ Work precarity is spreading across all economic sectors.

The digital economy encompasses a wide range of services and products. One part of the digital economy includes the commerce of goods (e.g., online buying and/or selling of products, such as through Amazon). Another part is referred to as platform-mediated work. The growth of platform-mediated work has the potential to provide workers, including women, people with disabilities, young people and migrant workers with income-generating opportunities.⁹ However, the work opportunities are often informal. The vast majority of workers who find employment through platforms are usually classified by law as self-employed or in-



dependent contractors.¹⁰ These workers are denied regular work and income, guarantees of safe working conditions, social protection, freedom of association and the right to collective bargaining. For example — with few exceptions — transportation platform companies and their algorithms dictate trip prices, fees and commissions (or “take rates”) that determine workers’ pay.

Platform companies that misclassify workers as self-employed or as independent contractors also have advantages over more traditional competitors because they elude responsibility for covering payroll taxes, health insurance, health and safety and other costs that traditional employers are typically required to cover.

The COVID-19 pandemic both increased the total number of platform workers — particularly delivery workers — and simultaneously brought attention to this category of workers since they were seen to be essential in many countries.¹¹

The International Labour Organization conducted surveys with 12,000 workers in 100 countries work-

5 Yahia Hatim, “HCP: More Than Half of Morocco’s Employed Labor Force Has No Diploma,” *Morocco World News*, 2021. <https://www.morocoworldnews.com/2021/02/335211/hcp-more-than-half-of-moroccos-employed-labor-force-has-no-diploma>

6 Safaa Kasraoui, “Morocco’s Unemployment Rate Reaches 12.4%,” *Morocco World News*, 2023, <https://www.morocoworldnews.com/2023/08/356851/moroccos-unemployment-rate-reaches-12-4>

7 “Coordinating the fight against precarious work in Morocco,” *Industrial*, 27 November 2015, <https://www.industrial-union.org/coordinating-the-fight-against-precarious-work-in-morocco>

8 *ibid.*

9 “The role of digital labour platforms in transforming the world of work,” *World Employment and Social Outlook*, International Labour Organization, 2021, https://www.ilo.org/global/research/global-reports/weso/2021/WCMS_771749/lang--en/index.htm

10 *ibid.*

11 “Digital platforms and the world of work in G20 countries: Status and Policy Action,” *International Labor Organization*, June 2021, https://ilo.org/wcmsp5/groups/public/---dgreports/---cabinet/documents/publication/wcms_814417.pdf



ing in the platform economy¹² between 2017 and 2020.¹³ Globally, the typical platform worker is male, under 35 years old and educated, with platform work as their main source of income.¹⁴ They work long hours, with drivers working an average of 65 hours a week and delivery workers 59 hours a week. Work stressors include traffic, low pay, lack of orders/clients, injuries while working and pressure to drive quickly. Discrimination is common, especially for women, and harassment by customers, restaurants and the police is commonplace.¹⁵ There is an unfair rating system with algorithmic management that results in reduced work and bonuses, penalties and account deactivation. Typically, there is no health insurance or other insurance that covers workplace injuries, unemployment, disability, or retirement benefits. The ILO study found that the lack of alternative employment opportunities, job flexibility and better pay compared to other available jobs are key motivating factors for people to take location-based platform work, and that work on digital labor platforms is the main source of income for the overwhelming majority of workers on location-based platforms.

12 “Decent Work in the Platform Economy,” International Labor Organization, 2022, https://www.ilo.org/wcmsp5/groups/public/---ed_norm/---relconf/documents/meetingdocument/wcms_855048.pdf (“Among official institutions, including the ILO, no definition exists as to what the platform economy might be. Moreover, different terms are used to refer to this phenomenon: collaborative consumption, collaborative economy, sharing economy, peer-to-peer economy, short-term services or gig economy, demand economy or platform economy. However, in specialized literature the latter term has been gaining more followers. Its main strength is that it places emphasis on what lies at the core of these activities, namely the fact that they are conducted using a platform.”) Therefore, the ILO’s use of the term ‘platform economy’ is referring to the same phenomenon as Tucker’s platform mediated work.

13 “Digital platforms and the world of work in G20 countries: Status and Policy Action,” International Labor Organization, June 2021, https://ilo.org/wcmsp5/groups/public/---dgreports/---cabinet/documents/publication/wcms_814417.pdf

14 *ibid.*

15 *ibid.*

Platform workers around the world are driving progress in the streets, courts and laws by organizing, by themselves or with the support of unions and worker rights organizations to improve their conditions and status. Some actions have been through digital means (such as logging off), while location-based platforms workers have engaged in strike actions. Some workers have also established platform co-operatives. Platform worker protests are common and varied. The ILO reported that from “January 2017 to July 2020, we identified 1,271 instances of worker protest in four platform sectors: ride-hailing, food delivery, courier services, and grocery delivery.”¹⁶ The Leeds Index, which tracks all platform worker protests globally and documented more than 1,900 since 2017, reported none in Morocco.¹⁷

II. OVERVIEW OF PLATFORM WORK IN MOROCCO

The platform economy is growing in Morocco. Morocco is heavily focused on growing its digital economy, including wide-ranging support to increase banking, digital transactions and e-commerce in the finance sector, and promoting start-ups and entrepreneurship among other goals. In June 2020, the Moroccan digital economy minister announced efforts to use digital technology to attract 10 billion Moroccan dirhams (about US\$1.04 billion) in foreign direct investment and create more than 120,000 direct and indirect jobs across the country. In 2019, the World Bank provided Morocco with 611.3 million euros (US\$700 million) in loans “to accelerate Morocco’s adoption of digital technology as a source of improved services, growth and jobs

16 Ioulia Bessa et al., “A global analysis of worker protest in digital labour platforms,” ILO Working Paper 70, ILO, 2022

17 Leeds Index of Platform Labour Protest, <https://leeds-index.co.uk>

and as key to leading the economic transformation.”¹⁸ To date, there is no national data on platform workers in Morocco.

Morocco’s transport sector is part of the national and global transformation of work through the subset of digital labor platforms that provide location-based labor services in ride hailing (also referred to as e-hailing, ridesharing or platform driving) and delivery. This phenomenon is exemplified in Morocco by the growth of Careem (now owned by Uber), the phone application that lets passengers hail a driver, and Glovo, the phone application that lets individuals order delivery food from restaurants and retail stores.

The ridesharing sector took off in Morocco with the establishment of Uber and Careem, both in 2015. The ridesharing sector has more total users and higher revenues than the delivery sector but has a comparatively slower expected growth rate.

- In this sector, revenue is projected to reach US\$66.35 million in 2024.
- Revenue is expected to show a compound annual growth rate (CAGR) of 4.7 percent from 2023 to 2027, resulting in a projected market volume of US\$76.35 million by 2027.

Platform-based delivery in Morocco has expanded quickly. The number of users is expected to reach 4.14 million users by 2027.¹⁹ It is estimated that:

- Revenue in the platform-to-consumer delivery segment is projected to reach US\$72.70 million in 2023.
- Revenue is expected to show a CAGR of 9.3 percent from 2023 to 2027, resulting in a projected market volume of US\$103.90 million by 2027.
- The number of users is expected to reach 2.7 million users by 2027.²⁰

18 “Morocco: New Program of Support Focused on Investing in People and Economic Transformation,” World Bank, <https://www.worldbank.org/en/news/press-release/2019/02/19/morocco-new-program-of-support-focused-on-investing-in-people-and-economic-transformation>

19 “Ride-hailing - Morocco,” Statista, 2024, <https://www.statista.com/outlook/mmo/shared-mobility/ride-hailing/morocco>

20 “Online Food Delivery - Morocco,” Statista, 2024, <https://www.statista.com/outlook/dmo/online-food-delivery/meal-delivery/platform-delivery/morocco>

By comparison, Morocco’s real total GDP is expected to grow by about 3 percent annually by 2027.²¹ These estimates show tremendous, expected growth of platform delivery and stable growth in platform ride hailing.

1. Legal Landscape

According to the Moroccan law that regulates individual entrepreneurship (Law 114/2013), platform workers are designated as “self-employed entrepreneurs.” Moroccan legislation aimed to regulate self-employed entrepreneurs through a legal framework governing individual entrepreneurship with a new law that came into effect in 2015. The first article of the law defines individual entrepreneurs as people who, in their individual capacity, carry out commercial, industrial or professional work that does not generate an annual turnover exceeding 500,000 Moroccan dirhams (approximately US\$50,000), or who render services with an annual turnover of less than 200,000 Moroccan dirhams (approximately US\$20,000).

These are the eligibility criteria to be an individual self-employed entrepreneur:

- Be a Moroccan national or a Morocco-based foreign permanent resident.
- Carry out industrial, professional or commercial business activities and/or renders services in their individual capacity.
- Not exceed the legally mandated annual turnover threshold.
- Comply with the applicable legislation.

Some of the advantages identified with the individual entrepreneurship classification includes:

- Easy business set-up and closure requirements
- Exemption from the mandatory requirements of the commercial register (CR)
- Exemption from the value-added tax (VAT)
- Flat rate taxes: 1 percent of commercial, industrial and professional activity annual turnover and 2 percent of annual turnover of rendered service

21 “Real GDP Growth (Annual percent change) - Morocco,” International Monetary Fund, 2023, https://www.imf.org/external/datamapper/NGDP_RPCH@WEO/OEMDC/ADVEC/WEOWORLD/MAR

- Possibility of home-based operations
- Exemption from foreclosure of the primary domicile

The Morocco Social Protection Project is an ambitious program that aims to enroll every Moroccan citizen in social protection. However, the reality is that self-employed entrepreneurs, like the majority of marginalized workers, fall outside the net of social protections. While there has been legal expansion in the program to extend social protection benefits to self-employed entrepreneurs, the reality is that none of the “self-employed entrepreneurs” we interviewed for this research was enrolled in social protections. During 2022, the government worked on enhancing the attractiveness of this business model by adding compulsory health insurance. To date, out of 317,744 self-entrepreneurs who are eligible for health insurance, 48,577 have enrolled in health coverage.

There have been multiple legal battles over the question of whether platform workers are “individual entrepreneurs” or whether their contractual relationship constitutes a “subordinate employer/employee relationship.” Unions and representatives of platform workers have argued that from a legal perspective, a contract by and between an individual entrepreneur and an employer creates, in practice, a subordinate employment relationship because the “individual entrepreneur” is dependent economically on the employer.

However, the contract does not grant the same protections and guarantees usually given to workers. The auto-entrepreneurship model is a relatively new legal framework for those who carry out, in their individual capacity, any of the business activities set out in the statute. It is rather difficult to apply labor code provisions to individual entrepreneurs or categorize them as workers.

2. Different Types of Platforms Available

Globally, there is often intense competition between traditional taxi companies and ride-hailing services, since there is a wave of new companies entering the market. Uber entered the Moroccan market in June 2015 by offering ride-hailing ser-

vices in Casablanca. Careem also started operating in Morocco in 2015 in Casablanca then expanded to Rabat and Tangier. By 2018, Careem estimated that it had 300,000 users across Morocco, while Uber estimated it had “nearly 19,000 regular users and 300 drivers.”²² The growth of these rideshare companies created deep tensions between them and traditional taxis in Morocco.

The ILO reported in 2021 that, “in developing countries, earnings in the app-based taxi and delivery sectors tend to be higher than in traditional sectors. [...] In addition, the bonuses and incentives provided to workers have attracted a large number of workers [...] result[ing] in intense competition. [...] Over 70 percent of the traditional taxi drivers [surveyed] reported that compared to when they started to work as taxi drivers, the number of trips in a typical day, and daily earnings, had decreased.”²³

Taxi drivers in Morocco — particularly those represented by unions — have aggressively fought the expansion of rideshare platforms. Moroccan law only allows conventional taxis to register as a legitimate service and has no provisions for privately hired vehicles. Nevertheless, Uber has operated without a license since its inception, which has led to frequently reported feuds with local taxi drivers who said the service was unfairly undercutting them. Tensions between taxi drivers and Uber drivers have escalated into violence with numerous incidents of intimidation, threats and car chases. In 2017, the Alliance of Trade Unions called on the National Telecommunications Regulatory Agency to ban Uber and Careem.

Taxi unions also partnered with Heetch to launch Fiddek as a counter to the influence of Uber and Careem. Fiddek is a ridesharing app that connects taxi drivers with customers. Careem later signed a memorandum of understanding with two major taxi unions in July 2018. The MOU offered Moroccan taxi drivers the opportunity to take advantage of ridesharing apps used by Careem for its services. The two unions, the National Union of Taxis (UNT)

22 Juliette Owen-Jones, “Uber to Buy Middle East Rival Careem for \$3.1 Billion,” *Morocco World News*, March 2019, <https://www.morocoworldnews.com/2019/03/268967/uber-to-buy-careem>

23 “The role of digital labour platforms in transforming the world of work,” *World Employment and Social Outlook*, International Labour Organization, 2021, https://www.ilo.org/global/research/global-reports/weso/2021/WCMS_771749/lang--en/index.htm

and the Democratic Transportation Union (SDT), represent 5,000 and 1,700 taxis, respectively.

Currently, the major players in Morocco's rideshare industry are Careem (Uber), Fiddek (Heetch) and Roby. Careem has the largest share of the market and was acquired by former rival Uber in January 2020. Uber shut down its own car service in Morocco in 2018. The US-based company InDrive is the other international rideshare company operating in Morocco. The current total number of drivers working for rideshare platform companies in Morocco is unknown.

Careem (Uber)

Careem is a ride-hailing company launched in 2012 by founders Abdulla Elyas, Magnus Olsson and Muddassir Sheika with headquarters in Dubai, United Arab Emirates. Careem is the biggest ride-hailing app in the Middle East. Careem claims it offers rides in 80 cities across nine countries.²⁴ Careem entered the Moroccan market by acquiring Taxiii, a taxi booking service operating in Casablanca and Rabat in March 2015. An article in *L'Economiste* in 2021 stated that Careem had more than 5,000 drivers (referred to as "captains") in Morocco.

Careem's website indicates that it operates in three Moroccan cities: Casablanca, Rabat and Tangier.²⁵

Careem initially received backing from German Daimler, Chinese Didi Chuxing, Saudi Arabian Kingdom Holding, Japanese Rakuten and a broad pool of investors.

Uber acquired Careem in 2020 in a deal valued at US\$3.1 billion. Upon acquisition, Careem stated that its "founders will continue to lead the business. Careem will retain its name, brand and identity." Careem's administration board was changed to include three representatives from Uber and two representatives from Careem. Uber reportedly sought the deal in order to penetrate important markets in the MENA region, especially Egypt, Jordan, Saudi Arabia and the United Arab Emirates. Before its acquisition, Careem was Uber's main regional rival.

²⁴ "Ride," Careem, <https://www.careem.com/en-AE/ride/>

²⁵ "Locations and Availability," Careem, <https://help.careem.com/hc/en-us/articles/1500010067882-Locations-and-availability>

Other companies

Heetch is a French app that launched in Morocco in 2017 through a partnership with taxi unions. Taxi drivers hoped the app would be a response to platform companies like Careem. Heetch operates in Casablanca, Rabat and Marrakech. In May 2019, Heetch raised US\$38 million in funding from Cathay Innovation, Idinvest Partners, InnovAllianz, Total Ventures, Alven Capital and Felix Capital. As of 2018, Heetch had 4,000 registered drivers.

A 2019 article in Morocco World News said that Heetch charged taxi drivers 5 dirhams (5 cents) commission per ride.

Roby operates similarly to Heetch, exclusively employing registered Moroccan taxi drivers with IDs and state approval. Drivers pay a at fee of 490 dirhams (US\$50.60) per month and receive full payment for their rides. Riders pay a base fee of 15 dirhams (US\$1.50) with normal taxi rates on top, but prices do not change with supply and demand. As of May 2019, Roby had 1,500 drivers and 10,000 clients on the app, with operations in Marrakech and Casablanca.

Food delivery app-based companies in Morocco

The top food delivery apps in Morocco are Glovo and, previously, Jumia. The marketing company Sunergia found that among individuals who used platform food delivery services in 2022, Glovo was used by 58 percent of Moroccans while Jumia was used by 41 percent. Researchers in the field report that, although several other digital delivery platforms exist, Glovo and Jumia overwhelmed smaller home delivery platforms such as Petit Coursier, Call Coursier, Le Coursier, Magi Courses, Le Replacements and My Colis, all of which have shifted to refocus their activities on specialties with less competition, particularly business-to-business.

Glovo (Delivery Hero)

Glovo is a Spanish-based platform that connects users with restaurants, groceries and other retail stores. In early 2022, Glovo reportedly had more than 70,000 monthly active couriers and more than 15 million yearly active users. It operated in 1,300 cities across 25 countries. In 2021, the company

■ Ride-hailing app-based companies:

Careem
HEETCH
Yassir
inDrive

■ Food delivery app-based companies:

Glovo?
JUMIA

recorded US\$904.53 million in revenue, and employed 3,500 people (not including drivers).

Glovo has substantial operations in Africa and started operating in Morocco in 2018. In September 2021, it announced an additional US\$60 million investment to expand its operations in Africa. Glovo runs its African continent operations from its offices in Morocco. The company claimed about 300,000 users, 8,000 restaurants and 12,000 couriers in Ghana, Kenya, Morocco, Nigeria and Uganda in 2022. Since then Glovo has expanded to Côte d'Ivoire and Tunisia.

Glovo was acquired by Germany-based Delivery Hero in the second quarter of 2022 for \$US2.6 billion. According to the Glove CEO Niklas Ostberg, "Glovo will continue to run with their existing brand." Delivery Hero offers similar services as Glovo, also facilitating the delivery of restaurant offerings, groceries and other goods.

Delivery Hero "is the world's leading local delivery platform," operating in over 70 countries across Asia, Europe, Latin America, the Middle East and

Africa. It also owns a network of platform brands globally, including Foodpanda, Hungerstation, PedidosYa, Talabat, Yemeksepeti and more. In August 2021, it acquired a minority stake in competitor Deliveroo. In 2022, the company recorded 8.6 billion euros in revenue (US\$9.3 billion) and 51,000 employees (not including drivers).

In 2023, Glovo operated in about 40 Moroccan cities, with 3,200 couriers (monthly average) and 4,600 partner stores (monthly average). In June 2022, Glovo announced it signed two agreements with Moroccan authorities, specifically the Ministry of Industry and Trade (MCINET) and the National Road Safety Agency (NARSA) — the agreements are part of Glovo's Global Social Impact initiative. The first agreement aims to create economic opportunities and support the digitization of local trade. The second agreement promotes road safety and awareness. According to a new study on the Moroccan market (Ghacht 2022), 58 percent of young Moroccans prefer to have their food delivered by Glovo.

Jumia Food

Jumia Food's parent company, Jumia Technologies, was launched in Nigeria in 2012 and is now headquartered in Germany. The e-commerce platform touts itself as the "Amazon of Africa" and is a third-party e-commerce marketplace. Jumia has since expanded its services to include food, grocery and product delivery, logistics, and payment and investment services. It has since expanded to 10 more countries on the continent, including Algeria, Côte d'Ivoire, Egypt, Ghana, Kenya, Morocco, Senegal, South Africa, Tunisia and Uganda. North African countries accounted for 28 percent of Jumia's revenue in 2022.

Jumia reported a 2022 revenue of US\$221.9 million and has reportedly partnered with 4,000 restaurants, including local brands and international fast food operations like KFC, McDonald's and Pizza Hut. The platform was reported to charge around 12 percent commission from its food partners.

Extreme inflation and devalued currencies in many African countries hurt Jumia's revenues and volumes in the first nine months of 2023, even as it eventually decreased losses. By the end of 2022, Jumia had ended restaurant food delivery in Egypt, Ghana and Senegal, and scaled back on first-party grocery in Algeria, Ghana, Senegal and Tunisia. Toward the end of 2023, Jumia announced its decision to close its food delivery operations in all remaining countries, including Morocco. This means that, at the time of writing, Glovo has consolidated its monopoly over food delivery app-based work in Morocco.

3. Methodology and platform workers' experiences in Morocco

The issues identified by the ILO on a global scale are generally manifest in Morocco as well. Since the Solidarity Center and union partners were primarily concerned with the question of how platform workers can come together to improve their working conditions, the field research conducted was focused on one area in Morocco, Casablanca, and one company, Glovo. The former was chosen because it has the highest density of platform





workers, and the latter because it is the largest platform company in Morocco.

The first focus group (seven people) was in the suburb of Casablanca, Mohamedia, and the second (five people) was in Casablanca itself. All participants worked for Glovo. They were all male and were on average 25 years old, which matches the ILO demographics for this workforce. Focus group participants were asked about the logistics of working for a platform company, social protection coverage and their outlook on unionization.

According to the workers, they are all considered self-employed workers and are in a precarious status with no minimum wage. They also lack paid holidays, retirement benefits, social protection, paid sick leave, and are exposed to violence. Most “Glovers” use motorbikes for which the company does not cover fuel costs or accident insurance. Moreover, their status as “auto-entrepreneur” does not give them the right to social benefits such as time off or severance.

To start working as a Glovo courier, candidates need to apply for work through the Glovo courier mobile application. Certain requirements need to be met, including being of legal age, having access to a vehicle and submitting documentation, such as a valid auto-entrepreneur card.

Each successful candidate must complete a two-day training period before delivering for Glovo. The first day of training is theoretical and monitored by a Glovo office in the candidate’s delivery zone. It tackles scheduling and identity verification. The second day of training is practical and managed by an experienced Glovo courier to go over the receipt of orders and contacting restaurants and customers. The actual work begins on the third day.

Each courier receives a Glovo backpack worth 200 dirhams (\$20), deducted from the courier’s earnings in two 100 dirham (\$10) installments. Couriers can replace the Glovo backpack every six months at their own expense. Couriers can also be issued additional gear, including raincoats, winter jackets, mobile phone holders, helmets and chargers at a cost deductible from their earnings.

Upon the successful completion of the two-day training, couriers start receiving work assignments from the platform. Glovo allows all couriers to determine their delivery zones and work schedules through the app. To deliver through Glovo, a courier needs to schedule their availability for the week ahead. Scheduling is open twice a week: couriers can schedule work hours for the weekend on Mondays and for the following week on Thursdays.

A benefit identified by workers in the platform economy sector is the flexibility and autonomy in setting their own schedules. There is concern that if they were legally classified as workers rather than freelancers, the freedom to set their own schedules would be taken away. Platform companies could, in theory, designate drivers and couriers as employees and still allow them the freedom to set their own schedules. Flexibility and social protections are not mutually exclusive benefits.

The work starts with picking up an order. Before checking in, Glovo expects couriers to:

- Punch in 25 minutes before their shifts start, time for which they are not compensated.
- Start their shifts in busier parts of the city to increase the odds of getting orders.
- Ensure their phones are charged and that the auto-accept orders option is enabled.

Couriers are considered to be “working” during the time they pick-up their order until they deliver their order. Before confirming their availability for delivery time slots, couriers are provided with a number of orders and their details, such as the pick-up restaurant’s name and address. Once at the restaurant, they check in using the app to indicate their availability on the premises for pick-up and then head straight to the end consumer upon receiving the order.

Couriers’ earnings depend on the number of completed orders and the company’s algorithms for measuring time and distance. The more orders carried out within the invoicing period/scheduled work period, the more earnings they receive. Six factors determine couriers’ earnings:

- Base price of an order

- Distance traveled from the pick-up point to the end consumer.
- Wait time: Couriers are compensated for each minute beyond the allotted 5 minutes.
- End consumers’ use of the option to change the delivery address.
- Incentives and promotions, including bonuses for working during extreme weather conditions, holidays, rush hour or at night.
- Tips; at the end consumer’s discretion.

Couriers get a daily digest of their earnings and can withdraw portions in cash, depending on the number of cash payments received by customers. Couriers can withdraw their earnings at the end of the pay period, i.e., on Tuesdays, or have their earnings transferred to the bank account registered on their Glovo account. Couriers are notified of their earnings through a Glovo earnings report sent to them via email. The invoicing period lasts for two weeks, starting on Monday at midnight and ending on Sunday at 23:59. At the end of the invoicing period, couriers are paid out earnings made from orders delivered during that period.

While all auto-entrepreneurs were entitled to enroll in social protection programs at their own expense, none of the participating workers were enrolled. They explained that they did not earn enough money to enroll. Employers typically enroll their workers in such programs, but Glovo does not, due to the legal classification of its couriers. In lieu of social protection policies, Glovo provides insurance for couriers in the event of an accident while delivering an order. The insurance covers accidents and damage to third-party property (that of retail partners or customers), so long as couriers are using the application and up until an hour after they are last seen online. Insurance also:

- Covers medical bills, including dental.
- Provides compensation for injury in cases of fractures and sprains.
- Provides up to 30 days’ worth of daily compensation if a courier cannot work following an accident.
- Provides compensation in the event of death or permanent and/or temporary disability.
- Reimburses funeral costs and related expenses.

- Provides benefits in cases of death.
- Provides other benefits in the event of childbirth or adoption.

In terms of performance management, the platform continuously monitors couriers' performance using a variety of indicators, including customers' ratings, completion rates (i.e. total orders delivered over the past 28 days), the number of times a courier fails to punch in on time, total orders delivered during rush hour, availability during the pre-booking phase, and the courier's rate of accepting or declining orders. This electronic evaluation system subsequently provides higher-rated couriers with more flexible scheduling options.

Glovo reserves the right to take punitive action against drivers who commit some violations, such as disrespecting customers, poor delivery service, failure to show up for shifts, low acceptance rates, "never delivered" violations, Glovo account rental, failure to deposit customer cash payments on time at Glovo's request, or misuse of GPS or internet connection. In the event of a violation, Glovo will place the courier's account on hold so as they can still access the account without being allowed to schedule slots or accept any orders. In other cases, the account may be deactivated.

The Glovo platform has procedures for couriers wishing to appeal the hold or deactivation placed on their account, allowing them to submit appeal forms via email. The platform then reviews the form and notifies the courier of its final decision. Workers are allowed to quit by simply deactivating their account.

There was a marked difference between the two focus groups and their attitudes toward unionization and whether Glovo respected their rights.

The first focus group saw that Glovo was not bound by the Moroccan labor code since the company was not headquartered in Morocco.²⁶ They also felt that they were not "unionizable," since they were auto-entrepreneurs and did not consider platform workers as within the domain of union work.

The second group saw Glovo as being bound by the Moroccan labor code and considers the company to be in violation of it by not providing written employment contracts; subjecting workers to work pressures that were punitive outside the parameters laid out by the labor code; and not guaranteeing workers any social protection policies or minimum wage. While the second group had displayed some hesitation about the idea of a union, they did see it as an effective tool to defend their rights.

It was outside the scope of this research to account for the differences towards unionization between the two focus groups. However, it is not uncommon to have mixed opinions about unionization in any workplace.

Some platform workers' conditions are reminiscent in some ways of industrial era working conditions, before the advent of unionization, when shifts were almost unlimited with no minimum wage, and workers were often on the job without being properly compensated. The birth of the union movement as we know it happened in the dawn of the industrial age. The rebirth of the union movement, globally, must happen in the dawn of the digital age.

III. CHARTING A PATH FORWARD

1. Policy Recommendations

The policy recommendations presented in this research paper are largely aimed at labor unions and ways through which they can incorporate platform workers in the unions' efforts to guarantee the workers protections. For labor unions to be able to effectively fulfill that role, the government must also play its role.

Globally, union density is on the decline, and Morocco is no exception. The misclassification of platform workers as independent contractors; the lack of labor code protections, employment contracts and common workplaces; and the high turnover all contribute to the difficulty unions face in informing platform workers about their rights and bringing them into their ranks.

²⁶ In fact, the labor code applies to all companies operating in the private sector, whether they're headquartered in Morocco or not.

In general, diminishing industrial activity, advances in technology and digitization, and globalization have changed the country's employment relations and trade union membership composition. For platform workers with no relationship to their "boss" beyond an algorithm, the possibility of attaining decent work, life-sustaining wages and access to their rights are distant possibilities — especially as unions struggle to reach, educate and organize workers. As work becomes increasingly application based, traditional forms of organizing become less effective.

This poses the question as to the role of the Moroccan labor movement in the future of work. Marginalization of organized labor through the attrition of members to gig employment or even replacement of labor unions by other models of social work and/or representation, such as through self-organizing or via nongovernmental organizations, is possible.

Another scenario is for unions to include platform workers in their ranks and advocate for the issues that impact this precarious, growing workforce.

While it may be true that platform workers are difficult to organize into unions, organized labor movements across the world play an important role in working to include platform workers in social protection policies and to ensure minimum working standards are enforced in the platform economy. Unions have pushed governments to make chang-

es through grassroots organizing, leading worker actions and initiating legal and legislative changes. Unions know that the best way to address the scourge of precarity from a worker perspective is to have workers covered under collective bargaining agreements.

2. Global Lessons

Platform workers are pushing litigation and legal actions in courts worldwide to have their status reclassified from self-employed, or entrepreneur, to employee. A study from the European Parliament found that 35 out of

59 court decisions in eight EU countries have made judgments favorable to platform workers since 2017. The European Parliament and Council of the European Union have been negotiating since December 2021 a directive aimed at improving working conditions for digital labor platform workers within the European Union.²⁷ But as of December 2023, they have been unable to reach an agreement.

Spain has been the lead country in protecting platform worker rights. It passed one of Europe's first laws relating to the gig economy in May 2021, requiring that food delivery platform workers be employed only through formal labor contracts.²⁸ Discussions around collective bargaining rights soon followed, and by December 2021, unions had signed the first collective bargaining agreement with platform delivery company Just Eat.²⁹

The Spanish Labor Ministry fined Delivery Hero's Glovo US\$78 million for allegedly violating labor laws.³⁰ Other countries where platform workers have won landmark cases over their status include

The rebirth of the union movement, globally, must happen in the dawn of the digital age.

27 "Rights for platform workers: Council and Parliament strike deal," Press release, Council of the European Union, December 2023, <https://www.consilium.europa.eu/en/press/press-releases/2023/12/13/rights-for-platform-workers-council-and-parliament-strike-deal/>

28 "Spain: Govt. approves landmark law to oblige 'gig economy' companies to employ their freelancers," Business & Human Rights Resource Centre, May 2021, <https://www.business-humanrights.org/en/latest-news/spain-govt-adopts-landmark-law-to-oblige-gig-economy-companies-to-employ-couriers/>

29 "Spain: first collective agreement for platform workers," *Industrial Relations and Labour Law*, February 2022, <https://industrialrelationsnews.ioe-emp.org/news/article/spain-First-collective-agreement-for-platform-workers>

30 "Spain fines Delivery Hero's Glovo a further \$62 mln over hiring," *Reuters*, January 2023, <https://www.reuters.com/legal/spain-fines-delivery-heros-glovo-further-62-mln-over-hiring-source-2023-01-24/>

Brazil, Chile, New Zealand and the United Kingdom, while an international team of law firms has been preparing a class-action complaint against Uber on behalf of South African Uber drivers.³¹

Countries around the world have taken various approaches to extending labor protections to platform workers. Examples, according to the ILO, include:

- **Collective bargaining:** Some countries, such as Canada, Ireland, Japan and Spain have introduced exceptions for certain categories of dependent self-employed workers, allowing them to engage in collective bargaining.
- **Occupational safety and health (OSH):** Laws in Australia and New Zealand have adopted broader statutory language and extended OSH coverage to all workers.³² In Brazil, a judicial decision has extended existing OSH legal standards to platform workers.³³
- **Social security:** France requires that platform companies cover the accident insurance costs of self-employed workers. Many Latin American countries have extended social security to self-employed workers. Indonesia and Malaysia provide work injury and death benefits to workers on particular platforms.³⁴
- **Employment relationship:** Countries have adopted various approaches to the employment status classification of platform workers, often arising from litigation, which fall along a spectrum between very broad and very narrow approaches to employment status. These range from (re) classifying them as employees, leaving them as independent contractors, or adopting (or creating a de facto) intermediate category in order to extend certain labor protection or benefits.

Platform companies have responded by routinely and viciously fighting in courts and legislatures against workers and regulatory control. On occa-

sion, a company might simply exit the market, leaving large numbers of workers unpaid or scrambling to find another source of livelihood.

In a sign of some possible shifting, Uber and Lyft settled a lawsuit in November 2023, led by the New York State Attorney General, in which they agreed to pay fines for wage theft, as well as institute minimum pay and paid sick leave.³⁵ This is in addition to the unemployment insurance that it had recently agreed to with the New York State Department of Labor. Uber has signaled that it can operate under any labor regulations, preferring those that classify drivers as independent contractors while still including some labor protection policies.

The settlement comes after many years of drivers and their unions and associations fighting for better working conditions. In a statement on the settlement, Uber wrote that this “helps put to rest the classification issue in New York” and “will serve as a model for other states.”³⁶

The latest example out of New York State represents a robust policy recommendation, which is to ensure that platform workers, no matter their legal classification, are entitled to social protection and freedom of association.

Organizing and Outreach

Policy recommendations for the union’s internal processes, at the level of organizing and outreach, include reforming the union’s internal structures as well as utilizing relevant technology:

- Building on the experiences of similar trade unions and labor organizations that did work in informal economies in Africa, Asia, Latin America and elsewhere that have innovated to use the internet as a tool to communicate with platform workers and expand the union membership scope to include auto-entrepreneurs.
- Revising trade union membership policy to include platform workers by reforming internal systems. This facilitates the transition

31 “Prominent Human Rights Lawyers Launch Class Action for South African Uber drivers,” *Leigh Day*, February 2021, <https://www.leighday.co.uk/news/news/2021-news/prominent-human-rights-lawyers-launch-class-action-for-south-african-uber-drivers/>

32 “The role of digital labour platforms in transforming the world of work,” *World Employment and Social Outlook*, International Labour Organization, 2021, https://www.ilo.org/global/research/global-reports/weso/2021/WCMS_771749/lang--en/index.htm

33 *ibid.*

34 *ibid.*

35 Jonathan Stempel, “Uber, Lyft to pay \$328 million to settle New York wage theft claims,” *Reuters*, November 2023, <https://www.reuters.com/business/autos-transportation/uber-lyft-pay-328-million-settle-new-york-wage-theft-claims-2023-11-02/>

36 Tony West, “Delivering Flexibility and Benefits for NY Drivers,” Press release, Uber, November 2023 <https://www.uber.com/newsroom/ag2023/>

from permanent to temporary membership options, which is in line with the changes to employment relationships.

If the union's internal structures allow for auto-entrepreneurs' membership, the union will be able to conduct effective outreach plans for platform workers that include using technology to raise awareness and establish a communications infrastructure, as well as providing services necessary for platform workers, such the facilitation of access to social protection:

- Innovating new online union membership options, especially for young people. These options should allow youth to engage in remote communication; access union educational, outreach and awareness-raising programs; and enjoy the right to vote in union elections and on collective bargaining agreements, social charters and strikes.
- Collecting data, identifying platform workers' working conditions and needs, conducting further field research, and writing analyses and recommendations on the legal protection of platform workers.
- Developing and providing consultancy services for self-employed and platform workers, especially in matters like worker rights, labor laws and social protection (such as labor law clinics). These services can be provisioned at a physical clinic or virtually through e-clinics that provide services relating to consulting, legal support, internet usage and social media platforms.

Advocacy

Once the union has created a leadership and communication infrastructure in touch with a base of workers, it can more effectively advocate for the rights of workers, including:

- Proposing bills, contributing to national plans, encouraging governments to ratify relevant regional and international agreements, and amending and enacting new legislation in line with these agreements to provide greater protection for platform workers.
- Enhancing active and effective participation in collective bargaining and national and international tripartite social dialogues comprising par-

ties working on production and raising awareness about digital platform worker-related matters.

- Reviving the role of unions in fostering cooperation and forming alliances with social organizations and other civil society movements to help go beyond the regular or traditional trade unions and form new alliances or hybrid organizations to enhance the monitoring of labor violations, advocacy, awareness-raising and defense of platform worker rights at the community level.
- Petitioning governments through the ILO to protect platform workers against poverty and ensure that they have access to the bare minimum of services, rights and social insurance.
- Improving means of international cooperation and representation in line with international framework agreements, preferential trade agreements, and monitoring systems like those of international organizations like the ILO and the Organization for Economic Co-operation and Development (OECD) to build political and social alliances on defending decent work conditions for digital platform workers.
- Launching a digital campaign to mobilize and raise awareness about the reality of Morocco's platform workers.

While advocacy at the national level is important, platform companies are multinational companies, and the exploitation of platform workers is a global phenomenon, making global solidarity alliances critical to effective advocacy. Therefore, effective union efforts need to include:

- International social dialogue and interorganizational cooperation among labor, worker and governmental organizations to establish, over time, a more effective and coherent approach and ensure the correct classification of platform workers so that they can enjoy the right to bargaining and social insurance benefits by expanding and adapting policies and legal frameworks as needed.
- Directly coordinating with drivers and couriers employed by the same platform companies across various countries to find common solutions.

Government Policy Recommendations

This research paper has focused on policy recommendations for unions since labor unions can play a primary role in ensuring that platform workers rights are protected and that they have access to social protections. The most critical role that the government can play is to ensure that workers' freedom of association is protected.

“The right to freedom of association involves the right of individuals to interact and organize among themselves to collectively express, promote, pursue and defend common interests. This includes the right to form trade unions.”³⁷ This entails, like in the New York State case, rejecting the misclassification of workers. The government has a critical regulatory and enforcement role to play as well, since laws are weak without robust enforcement.

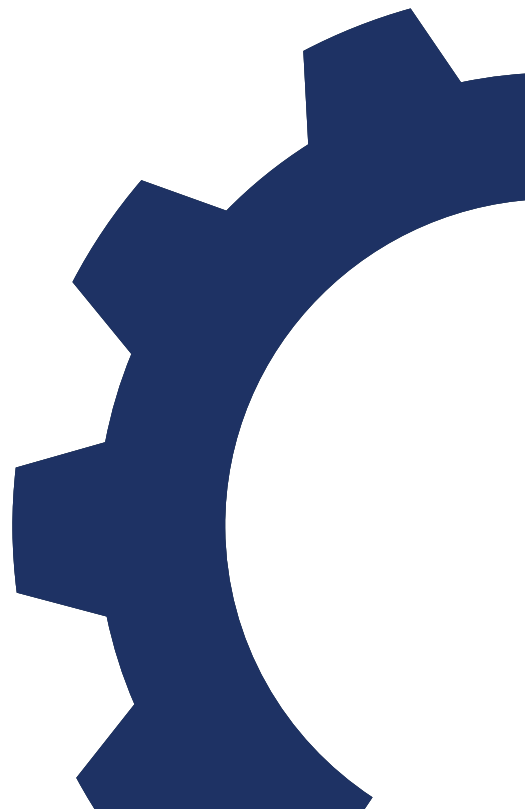
IV. CONCLUSIONS

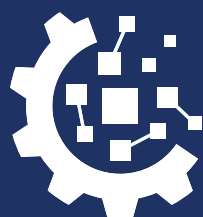
This research paper represents an initial step for labor unions in Morocco to explore the political economy of platform workers. Platform workers' ability to unionize will help incorporate them into government data and policy, as well as help platform workers access their rights to social protections.

There are three interrelated major obstacles from a platform worker perspective that labor unions need to overcome in order to be able organize platform workers. The obstacle is that platform companies have successfully framed the narrative — and thus implicitly threatened — that, if made employees, workers would lose their flexible scheduling. Workers enjoy their autonomy now, even as the algorithms and pricing incentivize them to work specific times and days. The second obstacle is related to the fact that the classification of auto-entrepreneurs as such keeps them from considering themselves as able to unionize, since they theoretically work for themselves. Many did not see themselves as eligible to join a union. The third obstacle is that, in countries like Morocco, the largest platform companies are owned by regional or global, re-

source-privileged companies with very little incentive to improve working conditions. In countries where companies have agreed to do so, it is typically after years of worker action, and legal, regulatory and legislative campaigns. For labor unions to organize platform workers, some of these questions have to be considered: How do you create a sense of collective identity and solidarity when workers are classified as auto-entrepreneurs? How can platform workers be organized when they fear they will lose the freedom and autonomy of flexible work? These questions can only be answered in the trial and error of unionization efforts.

37 “Freedom of assembly and of association,” Office of the United Nations High Commissioner for Human Rights, <https://www.ohchr.org/en/topic/freedom-assembly-and-association#:~:text=The%20right%20to%20freedom%20of,pursu e%20and%20defend%20common%20interests>





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