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SARUAROVA M.B.,*[1]
PhD student.
*e-mail: 24250404@turan-edu.kz
ORCID ID: 0009-0003-3412-954X
MAKSIMOV D.A.,[2]
d.e.s., associate professor.
e-mail: DA@rea.ru
ORCID ID: 0000-0001-8316-8359
KIRICHOK O.V.,[3]
PhD, associate professor.
e-mail: o.kirichok@cu.edu.kz
ORCID ID: 0000-0003-1059-4917
ORAZOVA B.B.,[4]
c.e.s., associate professor.
e-mail: bibigul077@mail.ru
ORCID ID: 0000-0002-1813-7836
[1]Turan University,
Almaty, Kazakhstan
[2]Plekhanov Russian University of Economics,
Moscow, Russia,
[3]Caspian University,
Almaty, Kazakhstan
[4]Tashenev University,
Shymkent, Kazakhstan

MODERN TRANSFORMATIONS OF THE LABOR MARKET IN URBANIZED KAZAKHSTAN: AN ECONOMIC ANALYSIS BASED ON THE CASE OF ALMATY

Abstract

Digitalization and the growth of informal employment are fundamentally transforming the labor market in post-Soviet cities, increasing social polarization and undermining traditional institutions of social protection. The present study considers Almaty as a representative megacity, which focuses on both global trends in the gig economy and local challenges to institutional adaptation. The purpose of the study is to analyze how digital platforms and hybrid forms of employment affect the structure of the urban labor market and the reproduction of social inequality. The theoretical framework includes the concepts of platform capitalism, dual labor market, digital neoliberalism and urban stratification. The research methodology combines bibliographic analysis, interpretation of statistical data (BNS RK, OECD), as well as analysis of institutional documents and cases of labor conflicts. It was revealed that as of the first quarter of 2025, 23.1% of all employed in Kazakhstan (2.2 million people) are self-employed, while the unemployment rate of 4.6% remains sluggish amid the growth of unstable forms of work. Protest activity in the platform sector (Wolt, Yandex Go) indicates an increase in social tension.The results confirm the formation of a class of "digital precariat" of institutionally unprotected workers involved in the digital economy. The practical significance of the research is in the development of recommendations for state policy in the field of regulating platform employment, modernizing social protection and sustainable development of the urban labor market in the context of digital capitalism.

Keywords: gig economy, digitalization, informal employment, labor market, social inequality, platform employment, urban labor market, algorithmic management.

Introduction

Modern transformations of the labor market in the context of digitalization and the growth of informal employment represent one of the key problems of socio-economic development of cities in the post-Soviet space. In recent years, special attention of researchers has been attracted by the rapid spread of digital platforms (gig economy, delivery, online services, freelancing), which redefine classical labor relations, forms of employment and the social protection system. Kazakhstan, as a dynamically developing country with growing megacities, is no exception to these processes.

Case 1: Wolt and Yandex Go Strikes (2021–2023)

The 2021 Wolt courier strike in Almaty mobilized over 3,000 workers demanding stable wages, insurance coverage, and transparent rating algorithms. PRACTICAL OUTCOME: Led to partial negotiations on minimum order values and penalty reduction. However, limited by platform's self-employment classification. POLICY IMPLICATION: Demonstrates urgent need for legal clarity on worker classification – self-employed vs. dependent contractor status – which would trigger mandatory social protection benefits.

Case 2: Informal Couriers and Spatial Inequality

Analysis of Almaty delivery geography reveals that unregistered couriers concentrate in South and East Districts (peripheral areas with limited formal sector jobs), while delivery demand concentrates in Central Business District. This creates 1–2 hour daily commutes with income volatility (25,000–45,000 tenge/month). PRACTICAL APPLICATION: Municipal planning should integrate informal worker routes into public transport planning and create local service hubs to reduce commuting and improve income predictability.

Case 3: Women Freelancers – Hidden Economy Segment

Survey data indicates 35–40% of Almaty-based freelancers on platforms (Upwork, Fiverr) are women earning USD 400–800/month. Most lack tax registration and social insurance. INSTITUTIONAL GAP: Current statistics do not capture this segment (they appear as self-employed but income sources not tracked). POLICY SOLUTION: Design simplified tax registration with reduced compliance burden for remote workers earning below 1 million tenge annually, linked to mandatory micro-insurance packages (healthcare, pension contribution matching 5% of income).

The term "gig economy" refers to an employment system in which employees perform short-term, irregular, or project tasks, most often through digital platforms such as Glovo, Uber, Yandex Go, and others. This form of employment is characterized by a flexible schedule, the absence of formal labor contracts and social protection, as well as a high degree of dependence on algorithmic control. In this study, the gig economy is considered as part of the broader processes of digitalization of labor and informalization of employment in the urban environment.

The city of Almaty, the largest economic and social center of the country, is a unique case study. It is home to key digital services, a high concentration of young workers, and a growing polarization between formal and informal employment. However, despite the international interest in the phenomena of the informal economy and digital employment, there is still a lack of systematic and empirically based sociological research in Kazakh scientific practice on how digital platforms and informal forms of employment affect the redistribution of economic and social risks, as well as the strengthening or mitigation of social inequality among workers in urban environments.

The present study aims to fill this gap. Its purpose is to study how the spread of digital platforms and forms of informal employment affects the structure of the urban labor market in Almaty and contributes to either strengthening or smoothing socio-economic inequality.

The scientific novelty of the study lies in a comprehensive interpretation of urban employment through the prism of digital transformation, the informal economy and the mechanisms of inequality, as well as in an empirical appeal to the features of Almaty as a megalopolis where global and local trends intersect. The practical significance of the work is related to the possibility of developing sound recommendations for labor, employment and social protection policies in the digital economy.

In the context of accelerating digitalization and hybridization of labor relations, the key scientific task is not only to record the quantitative growth of gig work and informal employment, but also to identify the mechanisms through which these processes affect the social stratification and economic sustainability of various groups of workers. The relevance of the research is determined by the

fact that Kazakhstan, being at the intersection of industrial heritage and digital transformations, is facing systemic changes in the employment structure, which still remain conceptually insufficiently understood in domestic science.

The theoretical and methodological basis of the research is based on modern sociological concepts of the platform economy [1, 2], labor in conditions of neoliberal restructuring [3], informal employment and labor market dualism [4, 5], as well as the theory of inequality and segmentation in an urbanized economy [6, 7]. These approaches allow us to consider the specifics of Kazakhstan within the framework of global trends, while maintaining the regional and empirical depth of analysis.

The problem field of the article is formulated through a research question: how are digitalization and informal employment changing the structure of the Almaty urban labor market and affecting the redistribution of risks and benefits between different socio-economic groups?

The presented research is aimed at expanding the boundaries of academic and applied knowledge about modern labor market transformations in the context of urbanization and digital capitalism, based on the Kazakh case and regional realities.

For a deep understanding of the transformations of the urban labor market in the era of digitalization, it is necessary to refer to the existing scientific literature, which reveals the relationship between the growth of the gig economy, informal employment and social stratification. This section provides a systematic overview of key concepts, empirical research, and theoretical approaches related to digital platforms, algorithmic management, new forms of labor mobility, and their implications for social inequality. Special attention is paid to international research and the local context of Kazakhstan, which allows us to build an analytical framework for subsequent empirical analysis.

The proliferation of digital platforms has become a key driver of the transformation of urban labor markets, especially in the global South. Platforms such as Uber, iFood, or Glovo have contributed to the rapid growth of the gig economy, accompanied by precarious forms of employment, lack of social guarantees, and algorithmic control [8, 9]. These changes not only redefined the relationship between employer and employee, but also increased the vulnerability of workers, especially in the context of the post-pandemic crisis. The work of Fioravanti, using the example of Sao Paulo, demonstrates how platform employment creates spatial and social inequalities, widening the gap between the central and peripheral areas of the city [8].

Increasing attention in the scientific literature is being paid to the problem of social stratification and inequality caused by the digital transformation of employment. On the one hand, the platform economy can reduce barriers to entry into the labor market, especially for youth, migrants and women, by providing flexible and affordable forms of work [10]. On the other hand, it perpetuates and even strengthens the vulnerable position of these groups, since such forms of work are usually not accompanied by employment contracts, insurance, and career opportunities [11, 12].

Comparative analysis shows that in countries with high levels of informal employment (including Kazakhstan), platform work reinforces the structural differences between central and peripheral urban areas. As Singh points out, migrants and low-income workers find themselves in the position of "internal outsiders" [11]; they are embedded in the city's economy, but excluded from its institutional guarantees. This phenomenon is also confirmed in the context of Almaty, where informal forms of work are not only growing in quantity, but also acquiring a stable spatial structure.

Modern research points to the ambivalent effect of platforms: on the one hand, they expand access to the labor market for low-income and marginalized groups, on the other, they fragment the labor market and institutionalize inequality [13]. The concept of "platform urbanization" describes how cities adapt to the interests of digital companies, forming new forms of inclusion and exclusion. At the same time, there is a growing trend towards political mobilization of platform workers, especially among informal couriers and drivers who advocate for improved working conditions and recognition of their rights [14].

Digital platforms use complex algorithmic systems to coordinate work, distribute orders, and monitor couriers' routes. This creates the illusion of autonomy, masking a high degree of subordination and control [8]. The analysis of "urban flows" shows how workers build movement strategies in search of orders, while facing high competition, congestion and unstable incomes. Such digital exploitation of territories and labor forms not only new forms of employment, but also spatial patterns of inequality [9].

The modern gig economy operates on the basis of algorithmic management, where the key actor is not a manager or an employer, but a digital interface. Studies emphasize [15, 9] that algorithms not only distribute tasks, but also form behavioral models, control the pace and territory of work, and create an asymmetry of power between the platform and the employee. At the same time, self-employment, which covers the platforms, acts as a legal mechanism for avoiding responsibility [12, 16].

The development of the digital economy has become one of the key factors in the transformation of urban labor markets in the 21st century. One of the most striking forms of this transformation is platform employment, which is a hybrid between formal and informal employment mediated by digital technologies. International studies indicate that platforms create the illusion of employee autonomy [11, 9], concealing rigid algorithmic and corporate discipline. This problem is especially acute in countries with unstable labor markets and high levels of social vulnerability, where the platform becomes not a choice, but a forced survival strategy [15].

Despite the active development of gig economics research in the Western literature, research in Central Asian countries remains limited [10]. These studies confirm that digitalization has a significant impact on employment, especially in large cities, but also reveal a lack of data on the informal sector and platform employment models [9].

Thirdly, the adaptation strategies of the workers themselves, namely their agency, resistance, organizational forms and perception of work, have not been sufficiently studied [17]. These approaches allow us to consider the spread of digital platforms not only as a technological phenomenon, but also as a form of social reorganization of labor and space, producing new configurations of inequality [1, 6, 7, 18].

Materials and methods

The study is based on a combination of bibliographic analysis and secondary data analysis, which allowed a comprehensive examination of the phenomenon of platform employment in the urban context of Kazakhstan.

Regarding data collection and analysis procedures for informal and platform workers, the following methodological clarifications are necessary. The case studies presented (Wolt and Yandex Go strikes, informal couriers, women freelancers) draw primarily on secondary sources: media reports, official labor dispute registries, and published academic literature. The quantitative indicators (e.g., 35–40% female freelancers, income ranges of 25,000–45,000 tenge/month) are derived from available platform-economy reports and prior surveys conducted by Kazakhstani researchers, rather than from a primary survey designed by the present authors. Sampling in these referenced studies was predominantly purposive and snowball-based, reflecting the methodological challenges inherent to studying unregistered workers. Potential biases include self-selection, underrepresentation of non-digitally connected workers, and the absence of a unified national registry of platform workers. The analytical framework applied to institutional documents follows a qualitative content analysis approach, identifying patterns of labor conflict, regulatory gaps, and spatial inequality. These methodological limitations are acknowledged in the Conclusion section of this article.

Primary data sources for policy implementation:

- Bureau of National Statistics (BNS RK): Quarterly employment data, self-employment indicators, informal sector tracking. PRACTICAL USE: Baseline for measuring policy impact; recommend quarterly reporting on platform employment segment separately.
- Ministry of Labor & Social Protection: Labor conflict registry, collective bargaining agreements, social protection coverage. PRACTICAL USE: Establish early warning system for protest activity; trigger targeted mediation protocols when indicators exceed 30% year-over-year change.
- OECD Employment Outlook 2025: Comparative international benchmarks on gig economy regulation, social protection models. PRACTICAL USE: Model best practices from Denmark (income-based social contributions) and Austria (platform worker co-determination rights) for Kazakhstan adaptation.
- Almaty City Administration Records: Business registration, tax compliance, platform company licenses, spatial employment distribution. PRACTICAL USE: Create municipal employment registry linked to urban planning for strategic worker support hub placement.

Results and discussion

The growing interest in platform employment and the gig economy in Kazakhstan reflects not only global trends, but also profound changes in labor relations. The relevance of the topic has increased especially after 2021, when labor conflicts became more frequent. Research by Aiman Zhusupova and Aigerim Yerken shows an increase in the number of protests and strikes among platform workers, which indicates high social tension [19]. Thus, the strike of Wolt couriers in Almaty in 2021 became one of the largest in the last decade, demonstrating the vulnerability of the platform economy [20].

The main problems are related to the uncertain legal status and lack of social protection. Deprived of collective representation mechanisms, platform employees are forced to express their dissatisfaction through protests and strikes, as in the cases of Wolt and Yandex Go. This points to the structural problems of labor relations management and the need to create effective conflict resolution tools.

The growth of labor protests, low wages, weak social protection and inefficiency of trade unions are increasing social tensions. To reduce inequality and improve working conditions, further study of platform employment and the development of system solutions in the context of digitalization are required.

1. The situation on the labor market of Kazakhstan

Relative stability remains in the labor market of Kazakhstan in the first quarter of 2025, but digitalization and the growth of informal employment continue to change its structure [21]. The employment rate among the population over the age of 15 was 64.4%, while 23.1% of the employed (2.2 million people) are employed in the informal sector.

Unemployment remains at 4.6%, but young people aged 15–34 face difficulties in finding employment (youth unemployment is 3.1%), which requires targeted support measures. Training and retraining programs cover only a small part of applicants, without providing a transition to sustainable employment.

Thus, despite stable macro indicators, a high proportion of informal employment remains, increasing social inequality and fragmentation of the labor market in the context of the spread of flexible and platform-based forms of work.

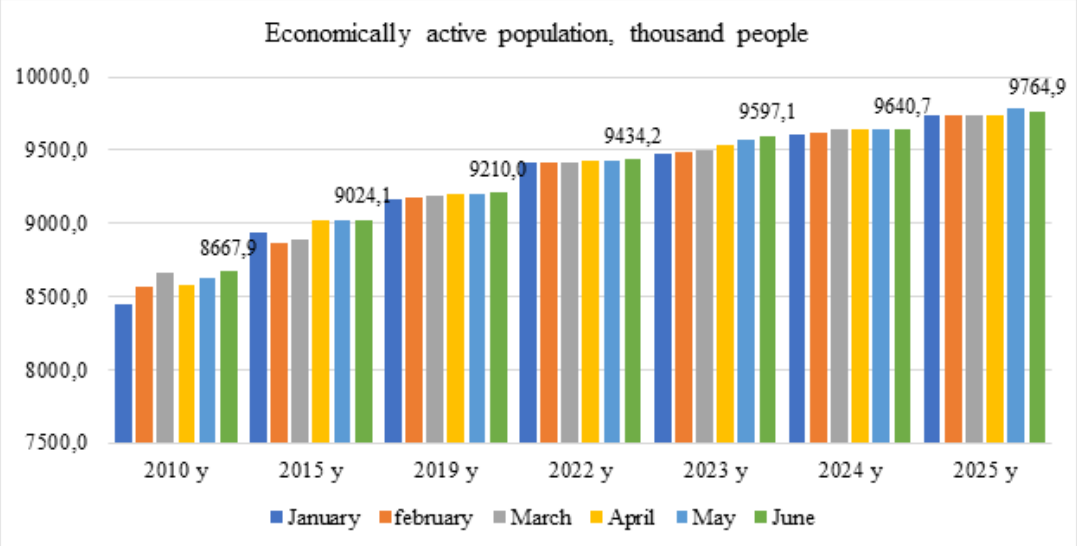

Figure 1 – The main labor market indicators for the months of 2010–2025

Note: Compiled by the authors on the basis of publication data [21].

For a more visual representation of the dynamics of the economically active population in Kazakhstan, a histogram is shown (see figure 1), reflecting monthly indicators for key years from 2010 to 2025. The data covers January-June of each year and demonstrates steady growth in the workforce over the long term.

Table 1 – Color table – Economically active population, thousand people [21]

Economically active population, thousand people						
Year/Month	January	february	March	April	May	June
The year 2010	8448,4	8560,4	8657,7	8574,1	8619,3	8667,9
The year 2015	8933,6	8866,0	8890,2	9023,4	9023,9	9024,1
The year 2019	9159,6	9178,8	9187,8	9199,8	9204,3	9210,0
The year 2022	9419,1	9420,1	9419,3	9427,4	9432,2	9434,2
The year 2023	9471,8	9491,2	9492,9	9532,8	9573,2	9597,1
The year 2024	9603,5	9613,1	9643,4	9642,0	9641,5	9640,7
The year 2025	9733,6	9735,9	9735,4	9734,4	9784,8	9764,9
Note: Compiled by the authors on the basis of publication data [21].						

The color scale from red to green illustrates the growth: from the minimum population values (dark red, 8448.4 thousand people in January 2010) to the maximum (dark green, 9784.8 thousand people in May 2025).

An analysis of the dynamics of the economically active population of Kazakhstan in 2010–2025 shows steady growth accompanied by a hidden structural transformation. Since 2023, the growth rate has been slowing down, which indicates that the limit of labor force involvement has been reached with the current demographic structure and the lack of new incentives. In these conditions, the problem of productive employment is particularly relevant, since quantitative growth is not accompanied by an increase in the quality of work, social protection and employment sustainability against the background of the expansion of informal and platform forms of work.

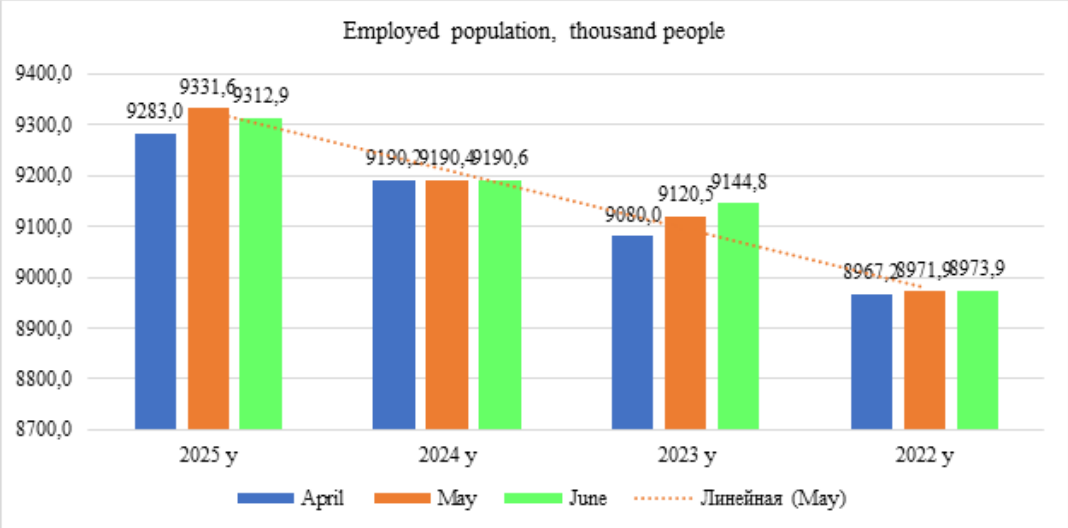

Figure 2 – Dynamics of the employed population in Kazakhstan by month (April–June, 2022–2025), thousand people

Note: Compiled by the authors on the basis of publication data [21].

The analysis of data for 2022–2025 shows an imbalance between employment growth and stagnation of unemployment. The number of people employed has increased from 8.9 to 9.3 million, while unemployment remains at 450–460 thousand, which indicates not a solution to structural problems, but an expansion of informal and flexible employment.

Employment growth is accompanied by a peak in May 2025 (9.33 million people) with a simultaneous increase in the unemployed (453 thousand), reflecting the inefficiency of existing mechanisms for involving the population in productive work [21].

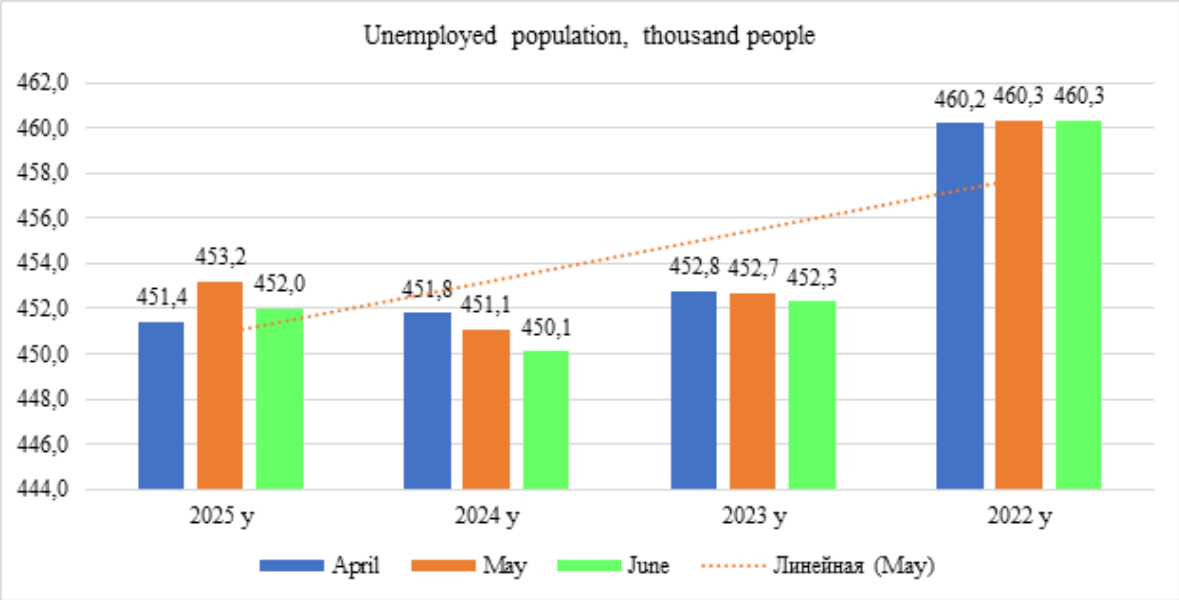

Figure 3 – Number of unemployed in Kazakhstan by month (April–June, 2022–2025), thousand people

Note: Compiled by the authors on the basis of publication data [21].

There is a typical paradox for Kazakhstan: quantitative employment growth is not accompanied by an institutional renewal of the labor market. The expansion is due to unstable forms of work without social guarantees. It is necessary to move from formal control of unemployment to creating conditions for sustainable and secure employment in the digital age.

2. The state of the labor market and key macroeconomic challenges

According to the OECD Employment Outlook 2025 report [22], despite the stability of global labor markets, there is a slowdown in their growth due to demographic pressures and structural changes. By the first quarter of 2025, the employment rate in the OECD countries reached a record 72.1%, but growth began to decline, and real earnings remain below the level of the beginning of 2021.

The aging of the population increases the dependence of economic sustainability on the involvement of women, older workers and migrants. In OECD countries, the age dependency ratio has increased from 19% in 1980 to 31% in 2023 and could reach 52% by 2060, increasing the burden on employment and social protection systems.

These trends are particularly relevant for Kazakhstan: with weak labor regulation institutions and an increase in informal employment, it is important to mobilize the potential of vulnerable groups and develop digital skills. Almaty, as the largest metropolis, reflects these global trends by concentrating the main forms of platform and flexible employment.

3. The results of the bibliographic analysis

In order to identify theoretical approaches and relevant research areas related to the transformation of the urban labor market in the context of digitalization and informal employment, the bibliographic analysis method using the specialized tool Connected Papers was used in this study. This platform allows you to visualize a thematic scientific field around a specific article, creating a graph of interrelated publications based on the similarity of cited and subjunctive sources.

The paper “Digital Platform Employment in Kazakhstan: Can New Technologies Solve Old Problems in the Labor Market?” (2022) [15] was chosen as the central article for analysis, which examines the features of digital platform employment in Kazakhstan in the context of institutional barriers and socio-economic consequences.

The platform’s algorithm is based on an analysis of the structural similarity of links, that is, it identifies articles that do not necessarily directly cite each other, but link to similar key sources. This makes it possible to identify semantically and conceptually similar publications, forming the field of “intellectual neighborhood” of this article.

The Connected Papers visual graph allowed:

1. Identify the core of related research on digital employment, gig economics, algorithmic management, and informal forms of work;

2. Select the key theoretical publications most frequently cited in this scientific field;

3. To identify structural gaps in the study of post-Soviet contexts and urban labor markets in developing countries.

The use of Connected Papers in the framework of bibliographic analysis provided a systematic mapping of the scientific landscape on the topic and allowed us to justify the choice of sources on which the theoretical and methodological part of the study is based.

The results of the bibliographic analysis. The visualization reflected two distinct groups of publications, which were interpreted as two thematic subarrays in the scientific field. The first group (see figure 4) is dominated by English-language research on general theoretical aspects of the digital economy, platform employment, informal labor, and algorithmic management. The second group (see figure 5) includes more regionally oriented studies, mainly by Kazakhstani and Central Asian authors [23, 24, 25], this may indicate the formation of a local research cluster focused on the study of digital employment and its social specifics in the post-Soviet context.

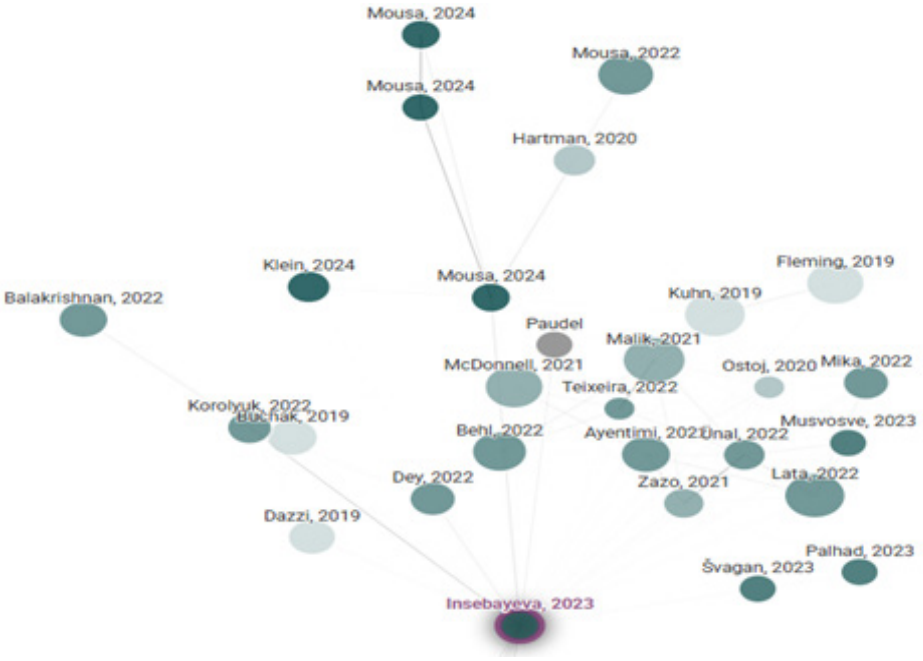

Figure 4 – Bibliographic network of global research on the topic of platform employment: the core of English-language scientific literature

Note: Compiled by the authors on the basis of documents and publications [15–30].

The main scientific research on the topic of digital and platform employment included in the bibliographic analysis (based on Connected Papers)

An analysis of the literature has revealed three interrelated approaches to understanding digital and platform employment.

First, at the global level, research records the rapid growth of the gig economy in conditions of weak hiring institutions and informality, accompanied by a blurring of labor standards and increased algorithmic control [27, 29]. Of particular importance is the concept of "time transparency" mandatory accounting of actual hours of work and hidden costs as the basis for fair pay [28].

Secondly, in the Kazakh context, platforms reproduce the structural imbalances of the labor market, and the legal uncertainty of the status of employees increases the risks and regulatory gap [15, 12, 30].

Thirdly, practices of shifting risks to employees and limiting collective action in the context of rapid digitalization have been identified in the healthcare sector [23]. Some studies emphasize the

inconsistency of management practices with new forms of work, which reinforces the institutional gap between business models of platforms and employment regulation [26].

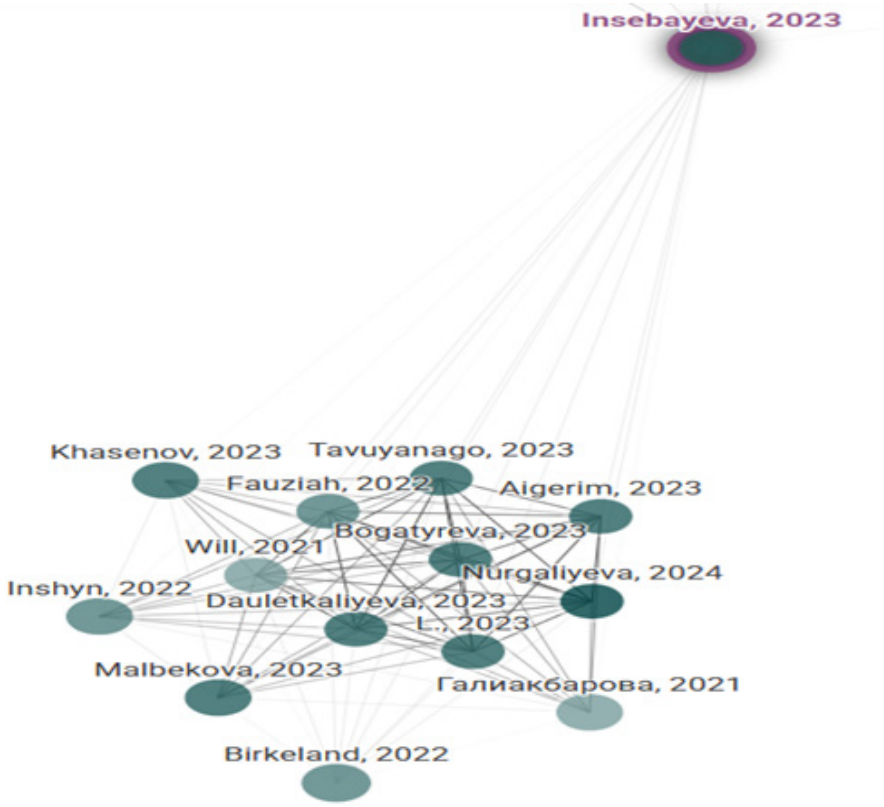

Figure 5 – Bibliographic network of regional and Kazakhstani publications on digital employment

Note: Compiled by the authors on the basis of documents and publications [15–30].

The synthesis of these lines provides a substantive perspective on the Kazakhstan situation. Firstly, the combination of «opaque time» and flexible (in fact, unilaterally variable) labor organization forms an underestimated share of unpaid «gray» employment, from waiting time for an order to communications and self-provision of resources [28]. Secondly, the legal ambiguity of the status of employees, between self-employment and an employment contract institutionally encourages withdrawal from the perimeter of labor guarantees (insurance, vacations, labor protection), which is explicitly warned by both Kazakhstani and regional reviews [12, 30]. Thirdly, medicine and related services show how «platformization» can penetrate into publicly significant areas: employers' demand for «global» specialists, the transfer of training and services to remote, local staff shortages in rural areas all this creates a breeding ground for splitting employment into short tasks with blurred responsibilities and responsibilities [25]. Pandemic cases of violations of the rights of health workers and criminalization of protest activity in comparable jurisdictions demonstrate that in the absence of preventive rules, the digitalization of labor quickly transforms into an increased asymmetry of «employee- platform/ employer». Taken together, this confirms the thesis [15]: without targeted institutional solutions, platforms do not «fix» the old problems of the Kazakh labor market (segmentation, informality, weak bargaining power of workers), but scale them to a new technological level.

This provides an application framework for policy and research. Regulatory a transition from point-based amendments to the "fair platform work" mode is necessary: (1) the introduction of "time transparency" metrics and standards with mandatory disclosure of methods for accounting for time and downtime in applications; (2) the presumption of labor relations in the presence of signs of control and dependence, with clear tests of subordination and risk redistribution, linked to Kazakhstan doctrine and comparative precedents [30]; (3) extension of collective rights and mechanisms of sectoral/

intersectoral contractual regulation to the platform-based, based on existing trade union practices in healthcare [23] and lessons from regulatory failures from comparable cases; (4) creation of a public data infrastructure for auditing algorithms for the distribution of orders, rate dynamics and safety indicators, with priority for socially important domains (healthcare, education, logistics) [25]. Research requires mixed designs linking platform logs with "household" data on income, time, and employment trajectories, as well as field comparisons with emerging markets, where similar threats and growth trajectories of the gig sector have already been described [27, 29]. Given the modest citation rate of local works so far and the novelty of the topic for Kazakhstan, it is precisely such a related analytical track that will make it possible to separate technological effects from institutional ones, and then build a bridge between platform innovations and decent work standards not declaratively, but through measurable changes in pay, time, and rights [15, 12, 28].

In Almaty, platform employment has become a buffer between the demand for fast services and the structural problems of the labor market. Taxis, delivery, and microservices attract young people and migrants with low entry thresholds, but they are accompanied by unstable incomes and lack of guarantees. Algorithmic management shifts risks to performers, and mixed schemes of self-employment dilute the legal status.

Platformization does not eliminate, but transforms the old problems of the city informality, congestion and social vulnerability of workers, increasing the fragmentation of the labor market.

The digital transformation of the labor market in Almaty has revealed not only new forms of employment, but also deep institutional shifts: informality has become a systemic part of the urban economy. With weak institutions and fragmented social policies, the gig economy is turning into a mechanism for redistributing risks from platforms to employees, increasing social inequality.

Almaty demonstrates the paradox of digital development: employment growth is accompanied by the erosion of labor guarantees and deepening stratification. The main challenge is not just technological modernization, but the formation of a new social justice architecture capable of integrating digital and platform based labor into a sustainable system for the protection and development of human capital.

Given the President's policy of building a «Digital Kazakhstan» and developing artificial intelligence, it is of particular importance to create institutions that will ensure not only technological progress, but also a fair distribution of its social effects, so that innovations strengthen rather than deepen inequality.

While the present study focuses on Almaty as a representative megacity case, Almaty's experience must be understood within a broader regional and global context to avoid overgeneralization. Comparative evidence from other post-Soviet cities suggests both commonalities and divergences. In Kyiv, Ukraine, and Tbilisi, Georgia, platform employment has similarly expanded as an informal buffer following structural deindustrialization; however, these cities exhibit somewhat stronger trade union traditions and legislative frameworks for collective bargaining, which have modestly mitigated precarity. In contrast, Tashkent, Uzbekistan, presents a closer institutional parallel to Almaty: high informality rates, weak labor protection enforcement, and a rapid expansion of gig platforms (Yandex Go, local food-delivery services) without adequate regulatory adaptation. At the global emerging-market level, research from São Paulo, Brazil [8] and Kathmandu, Nepal [29], confirms that the mechanisms linking platform growth with spatial and social inequality are not unique to Kazakhstan; peripheral urban workers are structurally disadvantaged across diverse institutional contexts. What distinguishes Almaty is the combination of a relatively high urbanization rate, an expanding digital infrastructure, and an institutional vacuum in platform labor regulation – a configuration that makes the city a particularly instructive case for the broader post-Soviet region. Future research should extend empirical comparison to Nur-Sultan (Astana), Almaty's sister megacity, which has a different economic profile (administrative and financial capital) but faces similar labor market fragmentation.

The empirical findings of this study are best interpreted through the integrated lens of dual labor market theory, platform capitalism, and urban political economy. Doeringer and Piore's dual labor market model [17] provides foundational analytical leverage: the persistent segmentation between a protected "primary" sector and an unprotected "secondary" sector, far from being dissolved by digitalization, is actively reproduced and intensified by platform architectures. Platform firms operate as institutional intermediaries that formally exclude workers from the primary sector while

generating economic value from their labor – a dynamic consistent with Srnicek's platform capitalism framework [1]. From the urban political economy perspective, Harvey's concept of spatial justice [7] and Sassen's global city thesis [6] illuminate how Almaty's economic geography shapes labor outcomes: the concentration of platform demand in the Central Business District, while supply is drawn from peripheral low-income neighborhoods, replicates the core-periphery dynamic at the intra-urban scale. Moreover, Standing's precariat theory [3] finds direct empirical resonance in the emergence of Almaty's "digital precariat" – workers formally classified as self-employed, deprived of collective bargaining rights, and subjected to algorithmic control. Deeper engagement with human capital theory and labor market segmentation models in future work would further enable quantification of the welfare losses associated with platform-driven informalization and support more rigorous policy evaluation.

The SWOT analysis and the Priority Implementation Strategy have been relocated from the Conclusion to the Discussion section, as recommended. These analytical and strategic elements, which synthesize the study's empirical findings into actionable institutional recommendations, are more appropriately situated within the Discussion, where they can be directly linked to the theoretical framework and comparative analysis. The Conclusion has accordingly been revised to focus on summarizing the main findings of the study and explicitly stating its methodological and empirical limitations to guide future research. The SWOT analysis (table 2) and Priority Implementation Strategy are presented below as integral components of the Discussion.

Table 2 – SWOT analysis: Platform employment and labor market in Kazakhstan (using the example of Almaty)

Strengths	Weaknesses
– Expanding access to the labor market for youth, migrants and women in the context of institutional discrimination in the formal market. – Rapid scaling up of employment in conditions of economic instability (crisis, pandemic). – The opportunity to earn income above the average salary in traditional sectors (especially in the field of delivery, transportation, freelancing). – The growth of digital and entrepreneurial skills in the new workforce.	– Labor and legal invisibility of the majority of employees: lack of social guarantees, trade union protection and contractual obligations. – Algorithmic management increases inequality and exploitation without the possibility of challenging decisions. – Low level of institutional recognition of platform employment in the Labor Code. – Digital labor perpetuates social vulnerability, especially among the self-employed, forced migrants, and students. – The lack of tax discipline and income fixation leads to a shortage of pension and social funds.
Opportunities	Difficulties
– Creation of a flexible social protection and tax accounting system for the self-employed and platform employees. – Formation of an urban employment policy that takes into account the informal and digital sectors. Expansion of digital education programs adapted to the requirements of the platform market. – Development of local platforms (e.g. Naimi.kz), focused on social, household and care services. – Support for micro-entrepreneurship through digital employment channels.	– The growth of protest potential among platform workers (the strikes of Wolt, Yandex Go, etc.). – The concentration of digital power in the hands of multinational IT companies that are not accountable to national regulators. – Dequalification: employment below the level of education, inability to achieve career growth. – The digital divide between generations and regions is limited access to platforms in rural areas. – Lack of transparency in the algorithms of evaluation, distribution of orders and revenue.
Note: Compiled by the authors.	

The transformation of the labor market in Almaty reflects not only technological, but also profound socio-economic changes. The future of employment depends on the ability of institutions to adapt to new forms of work, ensuring the protection of workers and a fair distribution of risks. These findings form the basis for policy development focused on equality, inclusivity and sustainability of work in the context of digitalization.

PRIORITY IMPLEMENTATION STRATEGY:

1. LEGAL CLARITY (Months 1–6): Establish unambiguous worker classification removing legal ambiguity that platforms currently exploit. This single measure would trigger automatic access to: minimum income guarantees, paid leave, pension contributions, injury insurance.

2. IMMEDIATE SUPPORT INFRASTRUCTURE (Months 3–12): Establish Digital Worker Hubs in Almaty offering real-time legal aid, skills training, and collective representation. Pilot income smoothing mechanism with leading platforms, demonstrating that social protection is achievable without eliminating platform model.

3. TRANSPARENT ALGORITHMIC GOVERNANCE (Months 6–18): Create independent oversight of rating/distribution algorithms. Current opacity allows systematic discrimination by algorithm – readily correctable through mandatory disclosure and bias auditing.

4. DATA-DRIVEN POLICY REFINEMENT (Ongoing): Establish quarterly monitoring dashboard tracking: worker income stability, social protection uptake, dispute resolution effectiveness, spatial equity metrics. Use real-time data to adjust policies maintaining responsiveness to rapidly evolving platform economy.

The research demonstrates that the challenge is not technological but institutional. Digital platforms are here to stay; the policy question is whether they function as pathway to opportunity or mechanism for risk redistribution. The answer depends entirely on institutional choices made in the next 18–24 months.

Conclusion

Platform employment and the gig economy have become an integral part of the labor market in the context of digital capitalism. The experience of Almaty shows that digitalization forms hybrid forms of work, blurs the boundaries between formal and informal employment and increases the vulnerability of workers with weak legal and social protection.

Young people, migrants, women and low-skilled workers who form the “digital precariat” remain the most vulnerable. The legislative framework does not keep up with the changes, and statistics do not reflect the real structure of employment. As of the first quarter of 2025, 23.1% of all employed in Kazakhstan (2.2 million people) are self-employed, yet this figure substantially underrepresents informal and platform workers who evade registration. Protest activity in the platform sector (Wolt, Yandex Go) signals growing social tension. The comparative analysis presented in the Discussion section indicates that Almaty’s challenges, while shaped by specific post-Soviet institutional legacies, share structural features with other rapidly digitalizing cities in Central Asia, Eastern Europe, and the Global South.

To reduce risks, it is necessary to move from a policy focused on formal employment to a model that recognizes new forms of work and ensures social justice and the sustainability of labor relations. The strategic recommendations developed in the Discussion section of this study – including the SWOT analysis and the Priority Implementation Strategy – provide a concrete institutional roadmap for policymakers, regulators, and digital platforms.

Limitations and directions for future research. This study has several important limitations that should inform the interpretation of its findings and guide future research. First, the reliance on secondary data sources – including official statistics from the Bureau of National Statistics, OECD reports, and published academic literature – may substantially underrepresent informal and unregistered platform workers, who are structurally excluded from official labor market statistics. Self-employment figures thus serve as a lower-bound estimate of actual gig economy participation. Second, the case study methodology, while providing in-depth contextual analysis of Almaty, limits the direct generalizability of findings to other Kazakh cities (e.g., Nur-Sultan/Astana, Shymkent) and to other post-Soviet urban contexts with different industrial structures and institutional histories. Third, the absence of longitudinal panel data on platform workers makes it difficult to assess the long-term effects of platform employment on individual welfare trajectories, social mobility, and the cumulative dynamics of social inequality. Cross-sectional snapshots, however rich, cannot distinguish between workers who use platform employment as a temporary stepping stone and those who are permanently

trapped in precarious gig work. Fourth, the quantitative estimates cited for particular worker segments (e.g., income ranges, gender composition of freelancers) are drawn from prior studies of varying methodological rigor, and should be treated with appropriate caution pending primary data collection. Future research should prioritize: (1) the development of longitudinal cohort studies tracking platform workers over time; (2) primary survey research with robust sampling strategies for hard-to-reach informal workers; (3) systematic comparative studies across Kazakhstani cities and post-Soviet contexts; and (4) gender- and age-disaggregated analysis of platform labor outcomes.

To effectively respond to the challenges posed by the digital transformation of the labor market in Almaty and in Kazakhstan as a whole, a systematic, institutionally verified approach is required, covering both legal and socio-economic regulation. Below are the key directions addressed to various actors from government agencies to the academic and private sectors.

1. Ministry of Labor and Social Protection of the Population of the Republic of Kazakhstan. It is necessary to initiate the development of a separate regulatory status for platform employees, taking into account the hybrid nature of their employment. This may include the introduction of a special category of "digital wage labor" in the Labor Code of the Republic of Kazakhstan, providing minimum standards for pay, vacations, insurance and mechanisms for resolving labor disputes. In addition, it is necessary to develop a flexible model of mandatory social contributions for the self-employed in the platform economy, which takes into account income instability, but at the same time guarantees participation in the social insurance system.

2. Ministry of Digital Development, Innovation and Aerospace Industry of the Republic of Kazakhstan. As part of the digital agenda, it is advisable to create a national register of digital platforms operating in Kazakhstan and oblige them to comply with standards of transparency in algorithmic management (in particular, public disclosure of the logic of ratings, conditions for the distribution of orders and revenue generation models). The Ministry should also oversee the development of an ethical code of algorithmic justice, including anti-discrimination principles regarding gender, age, ethnicity, and territorial origin of employees.

3. Agency for Strategic Planning and Reforms / Bureau of National Statistics of the Republic of Kazakhstan. It is urgently necessary to modernize the methodology of employment accounting, including hybrid and platform forms of work. In particular, it is proposed to introduce a new section in annual household surveys that records digital employment, the volume and regularity of income from platform work, as well as the level of accessibility of social protection. This will avoid distorting the overall picture of employment and develop a more accurate policy.

4. Akimat of Almaty and city departments of employment and social protection. An urban GIG employment management strategy should be developed with elements of local support for digital workers. In particular:

- Creation of municipal hubs for platform workers (spaces for collective support, legal assistance, and training);
- Launching social protection subsidy programs for couriers, freelancers, and the self-employed;
- Pilot implementation of a system of "flexible contracts" involving the city and private platforms. This is especially true in a megalopolis, where the largest number of such workers are concentrated and the protest potential is most often manifested.

5. Private digital platforms (Glovo, Yandex Go, Naimi.kz, Kaspi.kz, Olx.kz and others). It is recommended to switch from a model of hidden algorithmic management to a more transparent system of interaction with employees. It is necessary to introduce an "employee panel" with access to analytics, estimates, income dynamics and the basis of algorithm decisions, as well as create independent complaint review mechanisms. In addition, the platforms should participate in a public dialogue on the modernization of labor legislation and be included in the work of tripartite commissions with the participation of the state, trade unions and representatives of the digital economy.

6. Academic and research community. It is necessary to intensify applied research aimed at empirical study of platform employment models, including monitoring of social inequality, adaptation strategies of workers and spatial organization of work in megacities. It is recommended to establish an interuniversity research consortium on digital labor in Central Asia, which will fill knowledge gaps and strengthen cross-border scientific cooperation. Such research should be directly integrated into the design of urban and national policies.

7. International organizations (ILO, UNDP, OECD). It is recommended to strengthen Kazakhstan's support in developing models for regulating the digital economy based on global decent work standards. It is important to implement pilot projects on the social protection of GIG workers in Almaty with subsequent scaling to other cities, as well as to promote the formation of a regional competence center in the field of regulating the platform economy.

Modern challenges associated with the growth of the gig economy require proactive, strategically-oriented policies rather than reactive adaptation. Kazakhstan needs to move beyond the formal accounting of employment and create a flexible but fair institutional architecture focused on the inclusion of digital workers in the system of rights, guarantees and opportunities. This is the only way to avoid further segregation and ensure social sustainability in the context of digital capitalism.

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САРУАРОВА М.Б.,*[1]
докторант.
*e-mail: 24250404@turan-edu.kz
ORCID ID: 0009-0003-3412-954X
МАКСИМОВ Д.А.,[2]
э.ғ.д., қауымдастырылған профессор.
e-mail: DA@rea.ru
ORCID ID: 0000-0001-8316-8359
КИРИЧОК О.В.,[3]
PhD, қауымдастырылған профессор.
e-mail: o.kirichok@cu.edu.kz
ORCID ID: 0000-0003-1059-4917
ОРАЗОВА Б.Б.,[4]
э.ғ.к., қуымдастырылған профессор.
e-mail: bibigul077@mail.ru
ORCID ID: 0000-0002-1813-7836
[1]«Тұран» университеті,
Алматы қ., Қазақстан
[2]Г.В. Плеханов атындағы Ресей
экономикалық университеті,
Мәскеу қ., Ресей
[3]Caspian University,
Алматы қ., Қазақстан
[4]Ташенев университет,
Шымкент қ., Қазақстан

УРБОНИЗАЦИЯ ЖАҒДАЙЫНДАҒЫ ҚАЗАҚСТАННЫҢ ЕҢБЕК НАРЫҒЫНЫҢ ЗАМАНАУИ ТРАНСФОРМАЦИЯСЫ: АЛМАТЫ МЫСАЛЫНДАҒЫ ЭКОНОМИКАЛЫҚ ТАЛДАУ

Аңдатпа

Цифрландыру және бейресми жұмыспен қамтудың өсуі посткеңестік қалалардағы еңбек нарығын түбегейлі өзгертуде, әлеуметтік поляризацияны күшейтуде және дәстүрлі әлеуметтік қорғау институттарын бұзуда. Бұл зерттеу Алматыны концерттік экономиканың жаһандық тенденцияларына да, институционалдық бейімделудегі жергілікті сын-қатерлерге де назар аударатын өкілді мегаполис ретінде қарастырады. Зерттеудің мақсаты – цифрлық платформалар мен жұмыспен қамтудың гибридті нысандары қалалық еңбек нарығының құрылымына және әлеуметтік теңсіздіктің көбеюіне қалай әсер ететінін талдау. Теориялық негізге платформалық капитализм, қосарлы еңбек нарығы, цифрлық неолиберализм және қалалық стратификация ұғымдары кіреді. Зерттеу әдістемесі библиографиялық талдауды, статистикалық деректерді интерпретациялауды (ҚР ҰСБ, ЭЫДҰ), сондай-ақ институционалдық құжаттар мен еңбек жанжалдарының жағдайларын талдауды біріктіреді. 2025 жылдың бірінші тоқсанындағы жағдай бойынша Қазақстанда жұмыспен қамтылғандардың 23,1%-ы (2,2 млн адам) өзін-өзі жұмыспен қамтығаны анықталды, ал жұмыссыздық деңгейі 4,6%-ы тұрақсыз жұмыс түрлерінің өсуі аясында баяу болып қала береді. Платформа секторындағы наразылық белсенділігі (Wolt, Yandex Go) әлеуметтік шиеленістің артқанын көрсетеді. Нәтижелер цифрлық экономикамен айналысатын институционалды қорғалмаған жұмысшылардың «цифрлық прекариат» класының қалыптасуын растайды. Зерттеудің практикалық маңыздылығы цифрлық капитализм жағдайында платформалық жұмыспен қамтуды реттеу, әлеуметтік қорғауды модернизациялау және қалалық еңбек нарығын тұрақты дамыту саласындағы мемлекеттік саясат бойынша ұсыныстарды әзірлеуде жатыр.

Тірек сөздер: гиг-экономика, цифрландыру, бейресми жұмыспен қамту, еңбек нарығы, әлеуметтік теңсіздік, платформалық жұмыспен қамту, қалалық еңбек нарығы, алгоритмдік басқару.

САРУАРОВА М.Б.,*[1]
докторант.
*e-mail: 24250404@turan-edu.kz
ORCID ID: 0009-0003-3412-954X
МАКСИМОВ Д.А.,[2]
д.э.н., ассоциированный профессор.
e-mail: DA@rea.ru
ORCID ID: 0000-0001-8316-8359
КИРИЧОК О.В.,[3]
PhD, ассоциированный профессор.
e-mail: o.kirichok@cu.edu.kz
ORCID ID: 0000-0003-1059-4917
ОРАЗОВА Б.Б.,[4]
к.э.н., ассоциированный профессор.
[1]Университет «Туран»,
г. Алматы, Казахстан
[2]Российский экономический
университет им. Г.В. Плеханова,
г. Москва, Россия
[3]Caspian University,
г. Алматы, Казахстан
[4]Ташенев университет,
г. Шымкент, Казахстан

СОВРЕМЕННЫЕ ТРАНСФОРМАЦИИ РЫНКА ТРУДА В УСЛОВИЯХ УРБАНИЗИРОВАННОГО КАЗАХСТАНА: ЭКОНОМИЧЕСКИЙ АНАЛИЗ НА ПРИМЕРЕ АЛМАТЫ

Аннотация

Цифровизация и рост неформальной занятости коренным образом трансформируют рынок труда в городах постсоветского пространства, усиливая социальную поляризацию и подрывая традиционные институты социальной защиты. В настоящем исследовании Алматы рассматривается как представительный мегаполис, который фокусируется как на глобальных тенденциях в экономике гигантов, так и на местных проблемах институциональной адаптации. Цель исследования – проанализировать, как цифровые платформы и гибридные формы занятости влияют на структуру городского рынка труда и воспроизводство социального неравенства. Теоретическая база включает концепции платформенного капитализма, дуального рынка труда, цифрового неолиберализма и городской стратификации. Методология исследования сочетает в себе библиографический анализ, интерпретацию статистических данных (БНС РК, ОЭСР), а также анализ институциональных документов и случаев трудовых конфликтов. Было выявлено, что по состоянию на первый квартал 2025 года 23,1% всех занятых в Казахстане (2,2 млн человек) являются самозанятыми, в то время как уровень безработицы в 4,6% остается низким на фоне роста нестабильных форм занятости. Протестная активность в секторе платформ (Wolt, Yandex Go) свидетельствует о росте социальной напряженности. Полученные результаты подтверждают формирование класса «цифрового прекариата» из институционально незащищенных работников, вовлеченных в цифровую экономику. Практическая значимость исследования заключается в разработке рекомендаций для государственной политики в области регулирования платформенной занятости, модернизации социальной защиты и устойчивого развития городского рынка труда в условиях цифрового капитализма.

Ключевые слова: гиг-экономика, цифровизация, неформальная занятость, рынок труда, социальное неравенство, платформенная занятость, городской рынок труда, алгоритмическое управление.

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