

# EMBRACING THE DIGITAL AGE: THE FUTURE OF WORK IN THE WESTERN BALKANS

## NEW FORMS OF EMPLOYMENT AND PLATFORM WORK

Implications for youth employment policies and  
skills development

**COUNTRY REPORT: SERBIA**

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This report was prepared for ETF by PPMI

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# PREFACE

The European Training Foundation (ETF) is engaged in the international debate about the future of work in developing and transition countries, in particular in the EU Neighbourhood and Central Asia. It has launched several actions analysing global transformations that impact labour market performance and skills demand, identifying the implications for workers and learners. Updating and consolidating the knowledge on recent changes in work patterns driven by digitalisation sheds light on key issues for employment and skills development.

This report is a part of the ETF study conducted in the 6 Western Balkan countries, following the work in the 6 Eastern Partnership countries [The future of work: New forms of employment and platform work in the Eastern Partnership countries](#). The country-specific research and consultations in Serbia took place between December 2021 and May 2022. The manuscript was completed in June 2022.

The analysis confirms the huge impact of technological change on Western Balkan economies, including Serbia, with the Covid-19 pandemic accelerating digitalisation trends and increasing labour flexibility. New economic models with efficient matching of labour and skills demand and supply provide online-based employment opportunities and, to some extent, skills development. Young people take up those opportunities, which open up new markets and new ways of work, often becoming an alternative to migration. Therefore, beyond the inherent volatility of contractual relationships, issues of quality and inclusiveness, new forms of work are an important source of income, a place to use and develop skills, and a chance to harness entrepreneurial potential.

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# CONTENTS

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PREFACE	2
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INTRODUCTION	5
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SETTING THE SCENE	6
-------------------	---

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NEW FORMS OF EMPLOYMENT	10
-------------------------	----

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PLATFORM WORK	13
Remote platform work	14
On-location platform work	21

---

CURRENT REGULATION, POLICIES AND STRATEGIC APPROACHES	24
New forms of employment and platform work	24
Skills and employability	25
Digitalisation and digital skills	26

---

POLICY IMPLICATIONS	28
---------------------	----

---

SOURCES	30
---------	----

---

REFERENCES LIST	31
-----------------	----

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# INTRODUCTION

Social, economic, and technological changes within the EU and Neighbourhood countries, including the Western Balkans, have fostered a notable increase in **labour market flexibility**. New and non-standard forms of employment have grown in scale and prominence in recent years. Many of these new forms of employment deviate from traditional concepts of work, both in terms of their legal and contractual form, as well as in practical working conditions.<sup>1</sup>

Some of the most notable **non-standard forms of employment** include temporary employment; part-time and on-call work; temporary agency work and other multiparty employment relationships; and dependent self-employment. Besides the general trend of increasing flexibility in labour markets, digitalisation enhances the development of non-standard forms of employment. Work through digital labour platforms (platform work) is one of the more significant examples of recent transformations in the employment landscape, especially given the context of the pandemic.

Platform work is a new and expanding phenomenon and the key focus of this report. It can be defined as services provided on demand and for remuneration by people working through digital platforms. These platforms can facilitate the provision of both remote and on-location services that require varying skill levels, and – depending on the business model of the platform – exert various levels of algorithmic control over workers. Platform work can also be named as gig work, online freelancing, app work; or is simply better known by the brand of individual platforms such as Uber, Glovo, Upwork, and many others.<sup>2</sup>

This report examines the emergence of new forms of employment and platform work in Serbia by relying on a mixed-method approach to data collection and analysis, involving desk research, interviews, and analysis of automatically collected data from the platforms. The in-depth research was complemented with a survey to identify priorities for policy actions.

The desk research and interviews were conducted through English and Serbian between December 2021 and February 2022. Interviews were targeted at policy makers, representatives of business and worker associations, as well as platform companies operating in Serbia and people working through these platforms.

The automatic data collection was conducted between November and December of 2021 and targeted four platforms that are popular among freelancers from the Western Balkans – Freelancer.com, People Per Hour, Guru.com, and Hubstaff Talent. These platforms were selected based on the number of people from the region working through them, as well as the possibility to collect data in an automated way from the platforms. Upwork, one of the major platforms, could not be scraped due to measures implemented by the platform to limit such activities at the time the automated data collection took place. Therefore, this platform was covered through the other data collection methods.

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<sup>1</sup> Mandl, I. (2020). New forms of employment: 2020 update. New forms of employment series. Publications Office of the European Union. Luxembourg.

<sup>2</sup> The conceptual framework of platform work included in ETF (2021): The future of work – New forms of employment in the Eastern Partnership countries: Platform work, Annex I, available at <https://www.etf.europa.eu/en/publications-and-resources/publications/future-work-new-forms-employment-eastern-partnership>

## SETTING THE SCENE

The World Bank has classified Serbia as an ‘upper middle-income country’.<sup>3</sup> In 2012, Serbia was granted EU candidate status on account of significant progress made in structural and institutional reforms that took place after pro-democratic changes in the 2000s. Nevertheless, despite these positive trends and the favourable structure of the economy dominated by the services sector, the country has shown uneven growth and only marginally catching up with the average living standards of the European Union.<sup>4</sup> In 2020, Serbia’s GDP per capita (USD 7,720) remained significantly below that of Bulgaria (USD 10,079)<sup>5</sup>, one of the least developed EU Member States.

The impact of COVID-19 on Serbia’s economy was limited. The country ended in mild recession of negative 1% growth in 2020. Any adverse effects were largely mitigated by a significant fiscal stimulus programme amounting to around 13% of GDP. Consequently, COVID-19 did not lead to dramatic increase in poverty<sup>6</sup> or unemployment.<sup>7</sup>

Before the economic shock of COVID-19, the unemployment rate for those aged 15 and above stood at 10% in 2019, followed by the employment rate of 49%.<sup>8</sup> The results of the latest Labour Force Survey (LFS) (Q3 2021) indicate an unemployment rate of 10.5%, participation rate of 55.8%, and employment rate of 50.0%.<sup>9</sup> These figures demonstrate the historically highest rates of participation and employment,<sup>10</sup> including youth employment.<sup>11</sup> Indeed, in the period 2015 to 2021, the employment rate among young people (15–24 years) increased from 18.3% to 27.3%, while unemployment declined from 39.4 % to 23.1% - mostly in favour of men.<sup>12</sup> Meanwhile, the percentage of young people neither in employment, education, or training (NEET) worsened from 16.5% in the period 2014 to 2018<sup>13</sup> to 18% in early 2022.<sup>14</sup>

These trends stem from a combination of encouraging factors such as accelerated economic growth before the pandemic (averaging 4.4% in 2018 and 2019<sup>15</sup>), but also a shrinking population due to

<sup>3</sup> World Bank. (2022). World Bank Country and Lending Groups [Web log]. Retrieved February 2022, from <https://datahelpdesk.worldbank.org/knowledgebase/articles/906519>

<sup>4</sup> World Bank (2019). *Serbia’s New Growth Agenda - Forging a New Future*. Washington: World Bank. Retrieved from <https://thedocs.worldbank.org/en/doc/782101580729358303-0080022020/original/SerbiaCEMSynthesisweb.pdf>

<sup>5</sup> World Bank (2022). GDP per capita (current US\$) - Bulgaria, Serbia. [Web log]. Retrieved February, 2022, from <https://data.worldbank.org/indicator/NY.GDP.PCAP.CD?locations=BG-RS>

<sup>6</sup> World Bank (2021). Macro Poverty Outlook (MPO) [Web pdf]. Retrieved February, 2022, from <https://pubdocs.worldbank.org/en/155551492011111809/mposrb.pdf>

<sup>7</sup> National Bank of Serbia (2022). Macroeconomic Developments in Serbia. Retrieved from [https://nbs.rs/export/sites/NBS\\_site/documents-eng/finansijska-stabilnost/presentation\\_invest.pdf](https://nbs.rs/export/sites/NBS_site/documents-eng/finansijska-stabilnost/presentation_invest.pdf)

<sup>8</sup> Statistical Office of the Republic of Serbia (2020). Participation, employment and unemployment rate for the population aged 15+ [Announcement No. 051]. Retrieved from <https://publikacije.stat.gov.rs/G2020/Pdf/G20201051.pdf>

<sup>9</sup> Statistical Office of the Republic of Serbia (2021). Participation, employment and unemployment rate for the population aged 15+ [Announcement No. 329]. Retrieved from <https://publikacije.stat.gov.rs/G2021/Pdf/G20211329.pdf>

<sup>10</sup> Regional Cooperation Council (RCC). (2021). *Labour Markets in the Western Balkans: 2019 and 2020*. Sarajevo: Regional Cooperation Council. Retrieved from <https://www.rcc.int/pubs/120/labour-markets-in-the-western-balkans-2019-and-2020>

<sup>11</sup> European Training Foundation (ETF). (2021). *Youth situation in Serbia: Employment, skills and social inclusion*. Turin: European Training Foundation. Retrieved from [https://www.etf.europa.eu/sites/default/files/2021-06/youth\\_in\\_serbia.pdf](https://www.etf.europa.eu/sites/default/files/2021-06/youth_in_serbia.pdf)

<sup>12</sup> Statistical Office of the Republic of Serbia (2021). Rates of activity, employment, and unemployment for youth 15 – 24, Q3 2015 – Q3 2021. [Web log] Retrieved February 2022, from <https://data.stat.gov.rs/Home/Result/240003010102?languageCode=en-US&displayMode=table&guid=87bb51b8-dffc-4b6c-916c-c10145747971>

<sup>13</sup> Regional Cooperation Council (RCC). (2021). *Study on Youth Employment in Serbia, Annex 6*. Sarajevo: Regional Cooperation Council. Retrieved from [https://www.esap.online/download/docs/Study-on-Youth-Employment-in-Srbija\\_07072021.pdf/12d59f1c25990f81101b6418ed09f1d2.pdf](https://www.esap.online/download/docs/Study-on-Youth-Employment-in-Srbija_07072021.pdf/12d59f1c25990f81101b6418ed09f1d2.pdf)

<sup>14</sup> [Announcement No. 329]. Retrieved from <https://publikacije.stat.gov.rs/G2021/Pdf/G20211329.pdf>

<sup>15</sup> World Bank. (2021). Serbia: overview [Web log]. Retrieved February 2022, from <https://www.worldbank.org/en/country/serbia/overview#1>

ageing<sup>16</sup> and migration. These factors have been inflating the percentage of active labour force and employment rates, while pushing down unemployment figures.<sup>17</sup>

Outward migration has steadily increased despite positive trends in GDP growth and employment for both the general population and youth. This can be explained by an unfavourable domestic labour market, particularly when compared to the attractiveness of the labour markets in the EU. Serbia can be characterised as a dual labour market, with a significant portion of the labour force employed in insecure or outright informal, low-paying jobs that offer few career prospects,<sup>18</sup> and, thus, prompt people to look for better options abroad. The improvement in employment rates has contributed to a rise in formal employment in recent years<sup>19</sup>, yet new jobs mainly fall into the category described by the ILO as 'precarious and vulnerable employment'.<sup>20</sup>

In 2019, before the pandemic, workers on open-ended standard labour contracts represented the majority of the employed (77.4%), followed by those with fixed term contracts (19.4%), and finally those engaged in seasonal and occasional work (3.2%).<sup>21</sup> This demonstrates a significant deterioration of job security in comparison to 2010, when 88.5% of employees were hired via open-ended contracts.<sup>22</sup> The situation is somewhat different for young people aged 15 to 24 who have seen some improvement during the observed period. In 2018, 45.3% of young people held permanent contracts by contrast to 2015 when this number stood at 38.7%. Temporary contracts were held by 48.4% and 54.2% of young people in 2018 and 2015, respectively.<sup>23</sup> However, when compared to adult workers (25–64 years old), young people have remained in a more precarious situation.

**Flexible forms of employment**, such as service contracts, temporary and occasional employment contracts; vocational training or internship contracts; and employment contracts through student or youth cooperatives; are often abused by employers<sup>24</sup> (i.e., they are used instead of standard labour contracts). As stated in the Ex-post analysis of the National Employment Strategy 2011-2020, "legal regulations, already deficient, are interpreted too broadly and arbitrarily by employers, this practice is tolerated by state bodies and spreads to the public sector, so that these forms of work are becoming more prevalent and labour and social rights of those involved are becoming seriously violated".<sup>25</sup> The situation is further exacerbated by the absence of inspections which fail to ensure that unscrupulous employers comply with existing, however potentially inadequate, legislation.

<sup>16</sup> O'Neil, A. (2022). Serbia: Age structure from 2010 to 2020 [Web log]. Retrieved February 2022, from <https://www.statista.com/statistics/440653/age-structure-in-serbia/>

<sup>17</sup> Social Inclusion and Poverty Reduction Unit of the Government of Serbia. (2021). *Employment strategy of the republic of Serbia 2021–2026*. Belgrade: Social Inclusion and Poverty Reduction Unit of the Government of Serbia. Retrieved from [https://socijalnoukljucivanje.gov.rs/wp-content/uploads/2021/08/Strategija\\_zaposljavanja\\_u\\_Republici\\_Srbiji\\_2021-2026\\_engleski.pdf](https://socijalnoukljucivanje.gov.rs/wp-content/uploads/2021/08/Strategija_zaposljavanja_u_Republici_Srbiji_2021-2026_engleski.pdf)

<sup>18</sup> European Training Foundation (ETF). (2021). *How migration, human capital and the labour market interact in Serbia*. Turin: European Training Foundation. Retrieved from [https://www.etf.europa.eu/sites/default/files/2021-04/migration\\_serbia.pdf](https://www.etf.europa.eu/sites/default/files/2021-04/migration_serbia.pdf)

<sup>19</sup> Bradaš, S. Reljanović, M. Sekulović, I. (2020). *The impact of the COVID-19 epidemic on the position and rights of workers in serbia with particular reference to frontline and informal economy workers and multiply affected worker categories*. Beograd: Fondacija Centar za demokratiju. Retrieved from [https://serbia.un.org/sites/default/files/2021-02/Labour%20analiza\\_ENG\\_web.pdf](https://serbia.un.org/sites/default/files/2021-02/Labour%20analiza_ENG_web.pdf)

<sup>20</sup> International Labour Organization. (2012). From precarious work to decent work: Outcome Document to the Workers' Symposium on Policies and Regulations to combat Precarious Employment [Web pdf]. Retrieved February 2022, from [https://www.ilo.org/wcmsp5/groups/public/---ed\\_dialogue/---actrav/documents/meetingdocument/wcms\\_179787.pdf](https://www.ilo.org/wcmsp5/groups/public/---ed_dialogue/---actrav/documents/meetingdocument/wcms_179787.pdf)

<sup>21</sup> EurWORK. (2021). Seasonal worker [Web log]. Retrieved February 2022, <https://www.eurofound.europa.eu/observatories/eurwork/industrial-relations-dictionary/seasonal-worker>

<sup>22</sup> European Training Foundation (ETF). (2021). *Youth situation in Serbia: Employment, skills and social inclusion*. Turin: European Training Foundation. Retrieved from [https://www.etf.europa.eu/sites/default/files/2021-06/youth\\_in\\_serbia.pdf](https://www.etf.europa.eu/sites/default/files/2021-06/youth_in_serbia.pdf)

<sup>23</sup> European Training Foundation (ETF). (2021). *Youth situation in Serbia: Employment, skills and social inclusion*. Turin: European Training Foundation. Retrieved from [https://www.etf.europa.eu/sites/default/files/2021-06/youth\\_in\\_serbia.pdf](https://www.etf.europa.eu/sites/default/files/2021-06/youth_in_serbia.pdf)

<sup>24</sup> Bradash, S. (2018) *Precarious employment in the labor market of Serbia*. Belgrade: Center for Democracy Foundation

<sup>25</sup> Aleksić, D., Arandarenko, M., Ognjanov, G. (2020). *Ex post analysis of the national employment strategy for the period 2011-2020*. Belgrade: Foundation for the Advancement of Economics. Retrieved from [shorturl.at/nvF67](http://shorturl.at/nvF67)

Young people with lower skill levels are particularly vulnerable to unemployment.<sup>26</sup> The percentage of NEETs (young people not in employment, education or training) fluctuated from 20.1% in 2014 to 16.5% in 2018<sup>27</sup>, rising again to 18% in 2021 for the group 15-24 years old.<sup>28</sup> While being NEET for a shorter period of time is not particularly worrisome, staying in such situation for longer periods affects (re)integration into the labour market due to degradation of skills,<sup>29</sup> increasing the risk of poverty and social exclusion later in life.<sup>30</sup> Recent research shows that, on average, young people in Serbia spend one to one and a half years looking for a job, which is considered long-term unemployment, thus “delaying wages growth, training and the injection of young human capital into the economy”.<sup>31</sup> In general, young people, women and the elderly comprise the majority of those in long-term unemployment in Serbia. Their share of the labour market was 5.8% in 2019.<sup>32</sup>

The Serbian government sees **digitalisation and education** as the leading path towards turning Serbia into a knowledge-based economy with high quality jobs<sup>33</sup>. Policymakers believe that “the digitisation of smaller countries, such as Serbia, which were not among the winners of the third industrial revolution, provides a chance to fight to be in the ranks of the winners of the Fourth Revolution”.<sup>34</sup>

One of the measures of such progress is the Digital Economy and Society Index (DESI) which summarises indicators of Europe’s digital performance and tracks the progress of EU countries in four principal policy areas: connectivity, human capital, use of internet services, and integration of digital technology and digital public services.<sup>35</sup> According to the *International Digital Economy and Society Index 2020*<sup>36</sup> study, the I-DESI score for Serbia for 2015-2018 was 37.7, one place above the EU bottom four which is the lowest general score for the EU (36.9). Results were also particularly weak in terms of integration of digital technology (18 vs. 41.1), digital public services (45.5 vs. 56) and internet use (32.3 vs. 47), respectively.<sup>37</sup> On the other hand, Serbia scored moderately well in terms of connectivity (49.5 vs. 61.5) and almost equal in terms of human capital (40.2 vs. 41.8) in comparison to the EU average.

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<sup>26</sup> European Training Foundation (ETF). (2021). *Youth situation in Serbia: Employment, skills and social inclusion*. Turin: European Training Foundation. Retrieved from [https://www.etf.europa.eu/sites/default/files/2021-06/youth\\_in\\_serbia.pdf](https://www.etf.europa.eu/sites/default/files/2021-06/youth_in_serbia.pdf)

<sup>27</sup> Regional Cooperation Council (RCC). (2021). *Study on Youth Employment in Serbia, Annex 6*. Sarajevo: Regional Cooperation Council. Retrieved from [https://www.esap.online/download/docs/Study-on-Youth-Employment-in-Srbija\\_07072021.pdf/12d59f1c25990f81101b6418ed09f1d2.pdf](https://www.esap.online/download/docs/Study-on-Youth-Employment-in-Srbija_07072021.pdf/12d59f1c25990f81101b6418ed09f1d2.pdf)

<sup>28</sup> Statistical Office of the Republic of Serbia (2021). Participation, employment and unemployment rate for the population aged 15+ [Announcement No. 329]. Retrieved from <https://publikacije.stat.gov.rs/G2021/Pdf/G20211329.pdf>

<sup>29</sup> Regional Cooperation Council (RCC). (2021). *Study on Youth Employment in Serbia, Annex 6*. Sarajevo: Regional Cooperation Council. Retrieved from [https://www.esap.online/download/docs/Study-on-Youth-Employment-in-Srbija\\_07072021.pdf/12d59f1c25990f81101b6418ed09f1d2.pdf](https://www.esap.online/download/docs/Study-on-Youth-Employment-in-Srbija_07072021.pdf/12d59f1c25990f81101b6418ed09f1d2.pdf)

<sup>30</sup> Eurofound (2013). *Social Europe: Many ways, one objective, Annual report of the Social Protection Committee on the Social Situation in the European Union*. Luxembourg: Publications Office of the European Union. Retrieved from <https://ec.europa.eu/social/BlobServlet?docId=11503&langId=en>

<sup>31</sup> Pavlović, D., & Vukmirović, V. (2020). Strategic Measures for Reducing Long-term Unemployment Among Youth in Serbia. *International Scientific Conference Strategic Management and Decision Support Systems in Strategic Management*. [https://doi.org/10.46541/978-86-7233-386-2\\_31](https://doi.org/10.46541/978-86-7233-386-2_31)

<sup>32</sup> Statistical Office of the Republic of Serbia (2020). Participation, employment and unemployment rate for the population aged 15+ [Announcement No. 051]. Retrieved from <https://publikacije.stat.gov.rs/G2020/Pdf/G20201051.pdf>

<sup>33</sup> Brnabić, A. (2017, June 28). Keynote address by Serbian prime minister designate Ana Brnabić [Web pdf]. Belgrade. Retrieved February 2022, from <https://www.media.srbija.gov.rs/medeng/documents/keynote-address-pm-ana-brnabic280617.pdf>

<sup>34</sup> The Government of the Republic of Serbia. (2018, November 13). Digitalisation chance for economic advancement of small countries [Press release]. Retrieved February 2022 from <https://www.srbija.gov.rs/vest/en/133652/digitalisation-chance-for-economic-advancement-of-small-countries.php>

<sup>35</sup> European Commission. (2021). Questions and Answers: Digital Economy and Society Index (DESI) 2021 [Web log]. Retrieved February 2022 from [https://ec.europa.eu/commission/presscorner/detail/en/QANDA\\_21\\_5483](https://ec.europa.eu/commission/presscorner/detail/en/QANDA_21_5483)

<sup>36</sup> European Commission, Directorate-General for Communications Networks, Content and Technology, Foley, P., Sutton, D., Potter, R. (2020). *International Digital Economy and Society Index 2020: final report*. Publications Office. Retrieved February 2022 from <https://data.europa.eu/doi/10.2759/757411>

<sup>37</sup> all numbers for 2018



During the Covid-19 pandemic, the government pushed for improvements in the digitalisation field. According to the *Usage of information and communication technologies in the Republic of Serbia 2021* report, 81.5% of Serbian households have an internet connection, with 91.7% using fixed-line broadband service and 73.3% using mobile broadband. In general, internet service in Serbia is reliable and both the private and state-owned telecommunications companies are steadily accelerating the development of their fibre-optic networks.<sup>38</sup>

While the overall progress across many fields (use of digital tools in education, healthcare, and other e-government services) was significant, COVID-19 also revealed a divide when it comes to geographic areas (regions)<sup>39</sup> as well as across urban/rural lines.<sup>40</sup> One relatively recent study (2017) found that computer literate Serbians predominantly live in more affluent regions (Belgrade in particular) and in cities.<sup>41</sup> As expected, young people are more digitally literate than older generations and men are slightly more digitally literate than women.<sup>42</sup> In 2020, the state launched a programme to build fibre-optic infrastructure in previously neglected areas<sup>43</sup>, which is seen by many as one of the major factors in reducing the digital divide described above.<sup>44</sup>

Finally, the digital divide can be also observed in terms of distribution of digital skills. Research from 2020 shows that women and men in Serbia have approximately the same level of digital skills, but still lower than the European Union average.<sup>45</sup> The difference between Serbia and the EU average becomes particularly apparent when it comes to solving problems with the help of digital technologies. In Serbia, 34% of women have digital skills beyond a basic level compared to 54% of women in the EU-27. With regards to men, the situation is as follows: 42% in Serbia compared to 60% in the EU-27.<sup>46</sup>

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<sup>38</sup> Government of the Republic of Serbia. (2021). Report on Digital Inclusion in the Republic of Serbia for the Period 2018–2021. Retrieved February 2022 from [https://socijalnoukljucivanje.gov.rs/wp-content/uploads/2021/12/Izvestaj\\_o\\_digitalnoj\\_ukljucenosti\\_u\\_Republici\\_Srbiji\\_2018-2021.pdf](https://socijalnoukljucivanje.gov.rs/wp-content/uploads/2021/12/Izvestaj_o_digitalnoj_ukljucenosti_u_Republici_Srbiji_2018-2021.pdf)

<sup>39</sup> Serbia is divided into five regions (Vojvodina, Belgrade, Šumadija and Western Serbia, Southern and Eastern Serbia, Kosovo and Metohija)

<sup>40</sup> Stojanović, T., Penjišević, I., Lukić, T., & Živković, J. (2017). Computer literacy of young people in Serbia and regional differences. *Geographica Pannonica*, 21(1), 43-53. <https://doi.org/10.18421/GP21.01-04>

<sup>41</sup> Stojanović, T., Penjišević, I., Lukić, T., & Živković, J. (2017). Computer literacy of young people in Serbia and regional differences. *Geographica Pannonica*, 21(1), 43-53. <https://doi.org/10.18421/GP21.01-04>

<sup>42</sup> Stojanović, T., Penjišević, I., Lukić, T., & Živković, J. (2017). Computer literacy of young people in Serbia and regional differences. *Geographica Pannonica*, 21(1), 43-53. <https://doi.org/10.18421/GP21.01-04>

<sup>43</sup> The Government of the Republic of Serbia. (2018). Strategy for the Development of Next Generation Networks by 2023. *RS Official Gazette* 33.

<sup>44</sup> Social Inclusion and Poverty Reduction Unit of the Government of Serbia. (2021). Report on Digital Inclusion in the Republic of Serbia for the Period 2018–2021. Belgrade: Social Inclusion and Poverty Reduction Unit of the Government of Serbia.

<sup>45</sup> Babovic, M. & Petrovic, M. (2021). *Gender Equality Index for the Republic of Serbia - Digitalization, future of work and gender equality*. Belgrade: Social Inclusion and Poverty Reduction Unit of the Government of Serbia. Retrieved February 2022 from [https://eurogender.eige.europa.eu/system/files/events-files/gender\\_equality\\_index\\_for\\_serbia\\_2021.pdf](https://eurogender.eige.europa.eu/system/files/events-files/gender_equality_index_for_serbia_2021.pdf), p. 14

<sup>46</sup> Babovic, M. & Petrovic, M. (2021). *Gender Equality Index for the Republic of Serbia. Belgrade: Social Inclusion and Poverty Reduction Unit of the Government of Serbia*. Retrieved February 2022 from [https://eurogender.eige.europa.eu/system/files/events-files/gender\\_equality\\_index\\_for\\_serbia\\_2021.pdf](https://eurogender.eige.europa.eu/system/files/events-files/gender_equality_index_for_serbia_2021.pdf), p. 14

# NEW FORMS OF EMPLOYMENT

Atypical forms of work refer to both different types of work statuses that are regulated under existing legislation and are routinely recorded by conventional statistics, as well as forms of employment that are neither recognised by existing legislation, nor have been measured by official statistics until recently.<sup>47</sup> The first group are often referred to as non-standard forms of employment (NSFE) which is an umbrella term for different employment arrangements that fall outside standard employment and include temporary employment; part-time and on-call work; temporary agency work and other multiparty employment relationships; as well as disguised employment and dependent self-employment.<sup>48</sup> The second group is comprised of employee sharing, job sharing, voucher-based work, interim management, casual work, ICT-based mobile work, platform work, portfolio work and collaborative employment, which emerged in the 2000s alongside technological advancements.<sup>49</sup>

Prior to 2021, the Statistical Office of the Republic of Serbia (SORS) did not recognise many of these forms of work irrespective of whether they were rare (such as on-call work) or quite prominent in Serbia (such as platform work). In June of 2021, SORS announced changes to the methodology of the Labour Force Survey (LFS) aligning it with that of Eurostat. These changes are to be enforced starting in 2025. The LFS shall include new questions related to so-called “small jobs” and jobs carried out casually (remote platform work, transport services offered through web applications, translation services, distribution of flyers, caring for children, the elderly, pets, etc.). Although these jobs fall outside the traditional concept of employment, the new methodology recognises their presence in the labour market.<sup>50</sup>

In the meantime, LFS statistics continue to provide some data related to temporary and part-time employment. Nevertheless, data on temporary agency work or dependent self-employment are scarce for many reasons. On-call work is not widespread in Serbia, while temporary agency work has been governed by regular labour contracts since 2019 (i.e., open-ended, or fixed term contracts). Dependent self-employment was recognised only recently, mainly for tax purposes.<sup>51</sup>

The *Ex-post Analysis of the National Employment Strategy for the Period 2011-2020* provides a good overview of flexibility patterns in the Serbian labour market.<sup>52</sup> As of early 2022, almost one in four (about 23%) of workers were engaged in temporary jobs, understood as fixed-term contracts and non-labour contracts. This figure is 10 percentage points above the EU-27 average, which is about 13%. Part-time work is relatively less pronounced, but accounts for 9.6% of total employment.

Fixed term contracts and part-time work are often not a choice for workers but rather imposed on them. A 20% of temporarily employed workers and 37% of those employed on a part-time basis accepted these contractual terms because they were not able to find a job with an open-ended labour contract or full-time work, respectively. Almost 88% of those in temporary, seasonal, or occasional

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<sup>47</sup> Kovac, M., Andjelkovic, B. & Jakobi, T. (2020). Nestandardni oblici zapošljavanja u Srbiji: “Novi rad” u ekonomiji zasnovanoj na znanju. U Andjelković B. & Jakobi, T (Ur.) *Predvodnici promena na tržištu rada: Prototipovi dostojanstvenog rada za Srbiju u digitalnom dobu*, (pp. 16-25). Beograd: Centar za istraživanje javnih politika. Retrieved from <https://publicpolicy.rs/publikacije/3b7f07dbd23176247efc8181a2e95fc90f1fbd.pdf>

<sup>48</sup> International Labour Organization. (2022). Non-standard forms of employment [Web log]. Retrieved February 2022 from <https://www.ilo.org/global/topics/non-standard-employment/lang-en/index.htm>

<sup>49</sup> Eurofund. (2022). New forms of employment [Web log]. Retrieved February 2022 from <https://www.eurofound.europa.eu/topic/new-forms-of-employment>

<sup>50</sup> Statistical Office of the Republic of Serbia (2021). *Labour force survey, new methodology*. Belgrade: Statistical Office of the Republic of Serbia. Retrieved from <https://publikacije.stat.gov.rs/G2021/PdfE/G202122002.pdf>

<sup>51</sup> Jašarević, S. & Božičić, D. (2020). Kratka analiza domaćeg radno pravnog okvira sa osvrtom na status digitalnih radnika (frilensera) i predlog rešenja za nacionalnog zakonodavca. U Andjelković B. & Jakobi, T (Ur.) *Predvodnici promena na tržištu rada: Prototipovi dostojanstvenog rada za Srbiju u digitalnom dobu*, (pp. 16-25). Beograd: Centar za istraživanje javnih politika. Retrieved from <https://publicpolicy.rs/publikacije/3b7f07dbd23176247efc8181a2e95fc90f1fbd.pdf>

<sup>52</sup> Aleksić, D., Arandarenko, M., Ognjanov, G. (2020). *Ex post analysis of the national employment strategy for the period 2011-2020*. Belgrade: Foundation for the Advancement of Economics. Retrieved from [shorturl.at/nvF67](https://shorturl.at/nvF67)

jobs find themselves in this situation.<sup>53</sup> By contrast, the average share of workers in this position in the EU Member States stands at 24%.<sup>54</sup>

Another group of non-standard workers are those who are self-employed without employees (independent contractors), as well as the self-employed with employees.<sup>55</sup> In the period between 2012 and 2019, the share of self-employed workers in Serbia stagnated (20.1% against 19.9%).<sup>56</sup> The self-employed are represented predominantly in agriculture (59% for women against 55% for men), the service sector and sales (14.6% for women against 4.6% for men), and in crafts and related trades (2.7 for women against 13.6% for men).<sup>57</sup> Fourth position is held by professionals (8.4% for women against 5.4% for men), a category that includes those in platform work. Around 38% of the self-employed are engaged in the informal sector which raises concerns that their true earnings are underreported.<sup>58</sup> Young people are often self-employed; in 2019, one in ten young people in Serbia belonged to this category. Most of them did not receive tertiary education.<sup>59</sup>

Overall, informal work in Serbia is pronounced among non-standard forms of employment.<sup>60</sup> In 2019, the share of total employment taken up by informal work was 16%, with the largest subgroups being in unpaid family employment, farm workers, and construction workers, respectively.<sup>61</sup> In addition to young people, informal employment contracts are often held by women and older age groups.<sup>62</sup>

Overall, people in non-standard forms of employment share common challenges such as economic and social insecurity, and limited access to skills development and career prospects. Career progression is usually reserved for individuals in standard employment. This leaves atypical workers more susceptible to poverty and inequality. A 2017 study found that 10.7% of all employed people in Serbia were at risk of in-work poverty (IWP). The most vulnerable among them were part-time workers (with an IWP rate of 35.5%), the self-employed (35.1%), and workers with the lowest educational attainment (31%).<sup>63</sup> Among the self-employed, the majority work in low-paid sectors which adds to their vulnerability (only 17% find themselves in high-skilled professions<sup>64</sup>). This has significant individual, legal, economic, and social implications that require new solutions regarding non-standard forms of work, skills development, and labour relations.

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<sup>53</sup> Statistical Office of the Republic of Serbia (2021). *Labour force survey*. Belgrade: Statistical Office of the Republic of Serbia. Retrieved from <https://publikacije.stat.gov.rs/G2021/PdfE/G20215671.pdf>

<sup>54</sup> Aleksić, D., Arandarenko, M., Ognjanov, G. (2020). *Ex post analysis of the national employment strategy for the period 2011-2020*. Belgrade: Foundation for the Advancement of Economics. Retrieved from [shorturl.at/nvF67](http://shorturl.at/nvF67)

<sup>55</sup> OECD. (2019). *Non-standard forms of work and pensions, in Pensions at a Glance 2019: OECD and G20 Indicators*. Paris: OECD Publishing. Retrieved from: <https://doi.org/10.1787/5ffa7926-en>.

<sup>56</sup> Aleksić, D., Arandarenko, M., Ognjanov, G. (2020). *Ex post analysis of the national employment strategy for the period 2011-2020*. Belgrade: Foundation for the Advancement of Economics. Retrieved from [shorturl.at/nvF67](http://shorturl.at/nvF67)

<sup>57</sup> Statistical Office of the Republic of Serbia (2021). *Labour force survey, new methodology*. Belgrade: Statistical Office of the Republic of Serbia. Retrieved from <https://publikacije.stat.gov.rs/G2021/PdfE/G202122002.pdf>

<sup>58</sup> Pejin Stokic Lj. & Bajec J. (2019). *ESPN Thematic Report on In-work poverty – Serbia*. Brussels: European Commission. Retrieved from <https://ec.europa.eu/social/BlobServlet?docId=21094&langId=en>

<sup>59</sup> Regional Cooperation Council (RCC). (2021). *Study on Youth Employment in Serbia, Annex 6*. Sarajevo: Regional Cooperation Council. Retrieved from [https://www.esap.online/download/docs/Study-on-Youth-Employment-in-Srbija\\_07072021.pdf/12d59f1c25990f81101b6418ed09f1d2.pdf](https://www.esap.online/download/docs/Study-on-Youth-Employment-in-Srbija_07072021.pdf/12d59f1c25990f81101b6418ed09f1d2.pdf)

<sup>60</sup> The category of informally employed includes all persons working in an unregistered company, employees in a registered company but without a formal employment contract and without social and pension insurance, as well as unpaid family workers

<sup>61</sup> Dašić, B., Dašić, D., & Trklja, R. (2021). Shadow economy in Serbia in the time of COVID 19 pandemic. In N. Koropanovski (Ed.), *Thematic conference proceedings of international significance*, Archibald Reiss Days, 11. Belgrade: University of Criminal Investigation and Police Studies. Retrieved from <https://eskup.kpu.edu.rs/dar/issue/view/6/4>

<sup>62</sup> Regional Cooperation Council (RCC). (2021). *Labour Markets in the Western Balkans: 2019 and 2020*. Sarajevo: Regional Cooperation Council. Retrieved from <https://www.rcc.int/pubs/120/labour-markets-in-the-western-balkans-2019-and-2020>

<sup>63</sup> Pejin Stokic Lj. & Bajec J. (2019). *ESPN Thematic Report on In-work poverty – Serbia*. Brussels: European Commission. Retrieved from <https://ec.europa.eu/social/BlobServlet?docId=21094&langId=en>

<sup>64</sup> Statistical Office of the Republic of Serbia (2020). Participation, employment and unemployment rate for the population aged 15+ [Announcement No. 051]. Retrieved from <https://publikacije.stat.gov.rs/G2020/Pdf/G20201051.pdf>

While enhanced digitalisation facilitates the development of new forms of employment, atypical work has also grown as a result of the lack of good quality jobs and decent pay. The Covid-19 pandemic also contributed to this upward trend. The attractiveness of such jobs mainly lies in the low barrier to entry in comparison to other segments of the labour market. These jobs also offer more flexibility in juggling professional obligations, family commitments, and other goals one may pursue outside strict working times and schedules. In the current setting, non-standard forms of work are therefore, more suitable for those looking to earn extra money such as students, or those who can contribute only a fraction of their time to work, alongside other obligations such as caring for children or elderly relatives. At the same time, the evidence shows that there are many workers who engage in those jobs as a full-time employment. However, these working arrangements may also bring many risks that have not yet been sufficiently addressed by public policies.

# PLATFORM WORK

The COVID-19 pandemic has turned platform work into a topic of widespread interest. During the pandemic, people working in non-standard forms of work were often the first to lose their jobs.<sup>65</sup> Meanwhile prospects for remote work remained the same<sup>66</sup>, demand for on-location platform workers increased.<sup>67</sup>

Three factors contributed to the abrupt prominence of platform work during the COVID-19 pandemic. First, remote work and working from home suddenly became the daily routine for many white-collar workers. This new reality shed light on their peers working in the platform economy, to whom they turned for advice related to internet work protocols. Secondly, those who lost their jobs despite the government stimulus programme and a ban on workers' dismissal, decided to try their luck on popular platforms such as Upwork, Guru.com, and Fiverr; or on foreign language teaching platforms such as ABC Tutor, and Bibo, among others. Lastly, the government's attempt to collect taxes during this period compelled remote digital workers to organise street demonstrations. This showed their great number, which brought surprise to many.<sup>68</sup>

At the same time, from the perspective of on-location platform work, the online food delivery market in Serbia exploded due to the pandemic. Lockdowns forced consumers to avoid restaurants and search for the food delivery services of the online platforms. This resulted in a rise in the number of orders conducted over mobile apps and the internet in general, leading to the proliferation of providers of novel services, such as delivery of non-food items.

Some of the advantages of flexible working arrangements have also become more visible. Platform workers often state to cherish flexibility and workplace autonomy.<sup>69</sup> Regardless of whether they work remotely or on-location, they appreciate the variety and dynamism of the job itself.<sup>70</sup> Also, those in platform work - remote and on-location - are often better paid.<sup>71</sup> Furthermore, studies show that remote online platform work has the potential to promote formal work arrangements and reduce gender gaps in emerging economies.<sup>72</sup>

In short, the pandemic has placed the topic of platform work the agendas of policymakers, the public, and the media. However, interest in this phenomenon remains trivial, focusing only on certain aspects (e.g., high levels of pay). The gap in knowledge among stakeholders about the specificities of this work is hampering progress related to improving working conditions and employment security for platform workers.

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<sup>65</sup> Bradash, S. (2018). *Precarious employment in the labor market of Serbia*. Belgrade: Center for Democracy Foundation.

<sup>66</sup> Andjelkovic, B., Jakobi, T., Kovac, M. & Golusin, S. (2020). *A Hell of a Ride: The Prospects of Decent Work on Digital Delivery and Ride-hailing Platforms in Serbia*. Belgrade: Public Policy Research Center. Retrieved from <https://publicpolicy.rs/publikacije/d438466224abe8359006dae5dfec80fe10a71269.pdf>

<sup>67</sup> Andjelkovic, B., Jakobi, T., Kovac, M., & Golusin, S. (Forthcoming). *Fairwork Serbia Ratings 2021: Labour Standards in the Platform Economy*. Oxford: Fairwork Foundation

<sup>68</sup> Balkan Insight: 'Invisible' Balkan Freelancers Fight for Fair Taxation in a Digital Age, May 2021 <https://balkaninsight.com/2021/05/06/invisible-balkan-freelancers-fight-for-fair-taxation-in-a-digital-age/>

<sup>69</sup> Andjelkovic, B., Sapic, J., & Skocajic, M. (2019). *Digging into Digital Work in Serbia: Who are Crowdworkers from Serbia and Why They Work on Global Digital Platforms*. Belgrade: Public Policy Research Centre. Retrieved from <https://publicpolicy.rs/publikacije/961581c6008514f57a7635bbdf8c7bc1cbe24fea.pdf>

<sup>70</sup> Kirov, V., Andjelkovic, B., Jakobi, T. & Kosheva, M. (Forthcoming) *Is there decent work in the online food delivery business? Case studies of Bulgaria and Serbia*.

<sup>71</sup> Andjelkovic, B., Sapic, J., & Skocajic, M. (2019). *Digging into Digital Work in Serbia: Who are Crowdworkers from Serbia and Why They Work on Global Digital Platforms*. Belgrade: Public Policy Research Centre. Retrieved from <https://publicpolicy.rs/publikacije/961581c6008514f57a7635bbdf8c7bc1cbe24fea.pdf>

<sup>72</sup> UNDP. (2021). Digitally enabled new forms of work and policy implications for labour regulation frameworks and social protection systems [Web log] Retrieved February 2022 from <https://www.un.org/development/desa/dspd/2021/09/digitally-enabled-new-forms-of-work-and-policy-implications-for-labour-regulation-frameworks-and-social-protection-systems/>

## Remote platform work

Serbia has been one of the world's primary suppliers of remote digital platform workers for several years. In 2015, Serbia, Ukraine, and Romania were highlighted as the largest per capita contributors of remote digital platform workers worldwide in a seminal World Bank assessment.<sup>73</sup> A 2021 study showed that there were about 70,000 Serbians working either full-time or part-time on online platforms either,<sup>74</sup> which constituted 1.55% of the Serbian working age population (aged 15-64) in 2020.<sup>75</sup> Freelancing is also growing in popularity as an alternative to traditional employment in Serbia.

Despite COVID-19, which pushed a number of traditional workers into remote work and increased global competition<sup>76</sup>, the number of Serbian workers on online platforms remained relatively unchanged and the average asking price per hour slightly increased.<sup>77</sup> According to Forbes, the major freelancing platforms, such as Upwork, Fiverr, and Freelancer.com<sup>78</sup>, as well as the reports of payment platforms<sup>79</sup>, after the pandemic initially hit platforms recorded a robust rebound of businesses looking to hire more freelancers than before.

The most recent information on remote platform work is derived from three main sources: the Online Labour Index (OLI)<sup>80</sup>, the Gigmetar<sup>TM</sup> report<sup>81</sup>, and the data automatically collected for the purpose of this study. It is important to note that while the data from these sources complement each other and provide valuable indications about the scope of online work, the findings are not directly comparable:

- Gigmetar<sup>TM</sup> is the first instrument that aims to describe the geography of digital work in Serbia and Southeast Europe. It was designed to monitor the activities and characteristics of gig workers from Serbia and surrounding countries using Upwork, one of the most popular global online platforms, as the proxy. The measurement is performed twice a year as of January 2020. The report from August 2021 presents data on registered platform workers on Upwork, Freelancer.com and Guru.com.<sup>82</sup>

<sup>73</sup> Kuek, S.C., Paradi-Guilford, C., Fayomi, T., Imaizumi, S., Ipeiotis, P., Pina, P. & Singh, M. (2015). *The Global Opportunity in Online Outsourcing*. Washington: World Bank. Retrieved from <https://openknowledge.worldbank.org/bitstream/handle/10986/22284/The0global0opp0n0online0outsourcing.pdf?sequence=1&isAllowed=y>

<sup>74</sup> Colovic, P., Andjelkovic, B., & Jakobi, T. (2021). *How Many Online Workers Are There in Serbia? First National Assessment of the Number of the Online Workers on Global Digital Platforms*. Belgrade: Public Policy Research Center. Retrieved from <https://publicpolicy.rs/publikacije/bac4e207bba2e8a9fa84e063c954710e02b375ce.pdf>

<sup>75</sup> The meta-analysis encompassed data from the general platforms such as Upwork, Freelancer, Guru were included as well as the specialized ones such as Toptal, Stocksy, ABC Tutor, Beta Kid, etc Colovic, P., Andjelkovic, B., & Jakobi, T. (2021). *How Many Online Workers Are There in Serbia? First National Assessment of the Number of the Online Workers on Global Digital Platforms*. Belgrade: Public Policy Research Center. Retrieved from <https://publicpolicy.rs/publikacije/bac4e207bba2e8a9fa84e063c954710e02b375ce.pdf>

<sup>76</sup> Payoneer. (2022). 2022 Global Freelancer Income Report. Retrieved February 2022, from <https://www.payoneer.com/resources/>

<sup>77</sup> Anđelković, B., Jakobi, T., Ivanović, V., Kalinić, Z., Bogićević, M., Lundin, S. & Radonjić, Lj. (2020). *Gigmetar*. <http://gigmetar.publicpolicy.rs/>

<sup>78</sup> Forbes. (2020) Freelance Revolution Rising: Check Out The Growth At Upwork, Fiverr And Freelancer.Com Retrieved March 2022, from <https://www.forbes.com/sites/jonyounger/2020/08/18/freelance-revolution-rising-check-out-the-growth-at-upwork-fiverr-and-freelancercom/?sh=4e5e1a4f2af5>

<sup>79</sup> Payoneer. (2020). Freelancing in 2020: An Abundance of Opportunities Retrieved from <https://www.payoneer.com/resources>

<sup>80</sup> Otto Kässi, Vili Lehdonvirta, [Online labour index: Measuring the online gig economy for policy and research](#), *Technological Forecasting and Social Change*, Volume 137, 2018, Pages 241-248

<sup>81</sup> Anđelković, B., Jakobi, T., Ivanović, V., Kalinić, Z., Bogićević, M., Lundin, S. & Radonjić, Lj. (2020). *Gigmetar*. <http://gigmetar.publicpolicy.rs/>

<sup>82</sup> Anđelković, B., Jakobi, T., Ivanović, V., Kalinić, Z., Bogićević, M., Lundin, S. & Radonjić, Lj. (2020). *Gigmetar*. <http://gigmetar.publicpolicy.rs/en/region5-2/>

- The Online Labour Index (OLI) is the first economic instrument that collects supply and demand data for available online workers in real time. OLI data presents information on active (as opposed to only registered) platform workers on four English language web-based freelancing platforms, i.e., Fiverr, Freelancer.com, Guru.com, and People Per Hour.<sup>83</sup>
- Additional insights on occupations, gender gaps and pay are made based on automatically collected data for this specific study. The data collection took place in November 2021 and represents registered platform workers on Freelancer.com, Guru.com, Hubstaff Talent, and People Per Hour.

According to OLI data, online work has experienced an upward trend since Spring 2019, with several fluctuations.<sup>84</sup> As is visible in the graph below, the outbreak of the COVID-19 pandemic in March 2020 most likely caused the correlating spike in online work engagement in Serbia. Over the past five years, from 2017 to 2022, the level of engagement by Serbians in online work has significantly increased.<sup>85</sup>

**Figure 1. Trend of engagement of Serbian workers in online work on digital remote labour platforms over time, relative to the start of data collection in 2017**



Based on data scraped from selected platforms in November 2021, Serbians represented the largest number of online workers from the Western Balkan region on the four selected platforms (11,228).<sup>86</sup> Out of all Serbian online service providers, around 51% of workers were registered on Guru.com (5,777 freelancers). This appeared to be the most popular platform among Serbian workers out of the four listed above. The number and share of freelancers registered on the remaining platforms are illustrated in the figure below.

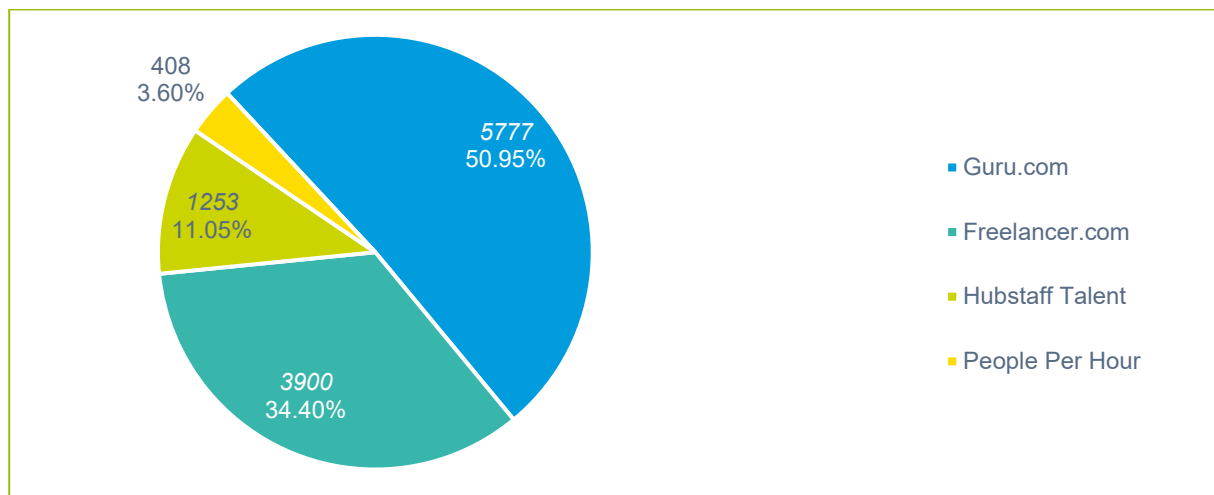
<sup>83</sup> Kässi, O.; Hadley, C.; Lehdonvirta, V. (2019). Online Labour Index: Measuring the Online Gig Economy for Policy and Research. figshare. Dataset. Retrieved from: <https://doi.org/10.6084/m9.figshare.3761562>

<sup>84</sup> Kässi, O.; Hadley, C.; Lehdonvirta, V. (2019). Online Labour Index: Measuring the Online Gig Economy for Policy and Research. figshare. Dataset. Retrieved from: <https://doi.org/10.6084/m9.figshare.3761562>

<sup>85</sup> OLI data presents figures from five largest English-language online labour platforms, representing at least 70% of the market by traffic.

<sup>86</sup> The four selected platforms for web-scraping were: Guru.com, Freelancer.com, Hubstaff Talent and PeoplePerHour.

**Figure 2. Number and share of registered platform workers from Serbia, by platform (November 2021)**



Nevertheless, Upwork has been the most popular platform in the country for many years. In early 2022, there were approximately 52,100 reviews for individuals from Serbia<sup>87</sup> registered on Upwork.<sup>88</sup> The combined sum of reviews that Serbian freelancers received on Freelancer.com, Guru.com and People Per Hour was just 30,411 in late 2021. Higher levels of activity among Serbians on Upwork were also confirmed by the Gigmetar™ report which found that 49% of freelancers from Serbia were registered on Upwork in August 2021.<sup>89</sup> Other popular platforms in the country were Toptal, 99desings, and several foreign language tutoring platforms, such as Beta Kid, ABC Tutor, etc.

The most important factors for engaging in remote platform work are the opportunities to easily find clients and safeguards ensured by the platform in terms of reciprocity between delivery and reimbursement for their services. As reported by the interviewees, the primary channel for learning about work opportunities on platforms was through their social networks. Contacts found through social networks are essential when it comes to spreading the word about platform work. One interviewee described the phenomenon in this way: “The whole buzz about the remote online work in Serbia must have started with only one freelancer whose social skills excelled”.<sup>90</sup> Remote platform workers rely on recommendations from their “tutors” on which platforms to begin building their profiles and where to start their engagement. Almost all platform workers have Viber, WhatsApp, or Facebook groups where they discuss advantages and disadvantages of working for particular a platform or mobile app, which also determines the popularity ranking of platforms in Serbia.

Only few remote labour platforms carry out active recruitment campaigns. One such platform is Upwork, the most popular online platform in Serbia. In the words of the Upwork Ambassador for Serbia,<sup>91</sup> the platform organises different kinds of events to promote its work and bring in new freelancers. Through these activities the new platform worker learns how to make a profile on Upwork, what skills they should promote, and how much they should charge. The platform also provides tailored guidance from experienced freelancers. “The competition became tougher with the pandemic, and now the market is much more competitive than before. This is why our events are not only about recruitment, but also about guiding local freelancers through new challenges” said the Upwork

<sup>87</sup> Available at: <https://www.upwork.com/hire/rs/>

<sup>88</sup> This is the only available metric, as the platform does not provide a number of registered workers, and implement measures to block automated data collection attempts.

<sup>89</sup> Anđelković, B., Jakobi, T., Ivanović, V., Kalinić, Z., Bogičević, M., Lundin, S. & Radonjić, Lj. (2020). *Gigmetar*. <http://gigmetar.publicpolicy.rs/en/region5-2/>

<sup>90</sup> Interview with a remote platform worker working through Upwork, date 2022, 01-11

<sup>91</sup> Interview with the Upwork Ambassador for Serbia, date 2021, 12-29. Upwork has ambassadors in countries with high numbers of people working through the platform. In the region, besides Serbia, Upwork has ambassadors in Ukraine and Romania.



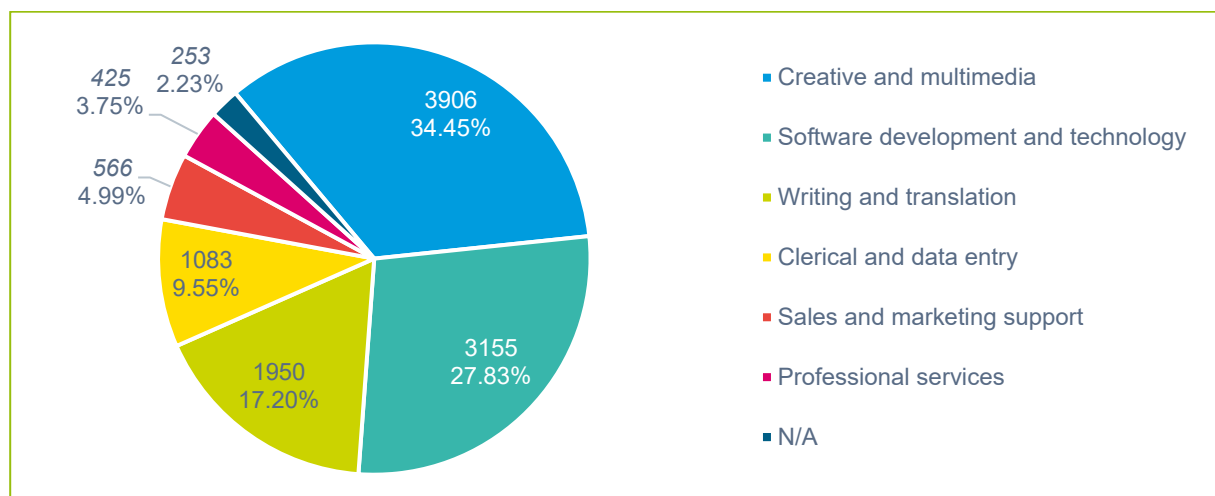
Ambassador for Serbia in late 2021.<sup>92</sup> Other platforms that actively recruit new workers are those that provide foreign language tutoring.

Clients that use the services of Serbian remote workers can be both individuals who need support in completing a task or companies. As described by the Upwork Ambassador in Serbia, clients may represent small and big businesses, and are often from the USA, Canada, and the Middle East. In the creative industry, clients often come from Australia and Europe, as reported by an interviewee. Meanwhile, tutoring and teaching foreign languages is requested mainly by clients from China.

According to the OLI classification, Serbian remote workers engage in the following six occupations: 1) creative and multimedia, 2) professional services, 3) software development and tech, 4) writing and translation, 5) sales and marketing support, and 6) clerical and data entry. The latest Gigmeter™ measurement<sup>93</sup> reaffirms the finding that creative and multimedia and software development and technology remain Serbia's dominant freelance occupations, even though the software development field remains twice as small (22%) as creative and multimedia (39%). The shares of these two occupations remain almost unchanged from the previous measurement. Next in line is clerical and data entry, which constitutes 15% of the remote workforce and writing and translation with 13%.<sup>94</sup>

These findings appear to be consistent across various platforms. Based on the automatically collected data for this study from a somewhat different selection of online marketplaces, the most common occupation was also related to creative industry and multimedia. Around 34.5% of registered workers engage in this occupation, followed by software development and technology with 27.8% of workers. According to the data collected, the third most common occupation was writing and translation with almost 2,000 freelancers, making up 17% of all registered workers. The distribution across occupations is illustrated in the figure below.

**Figure 3. Occupations of all registered platform workers from Serbia on Freelancer.com, Guru.com, Hubstaff Talents and People Per Hour platforms (November 2021)**



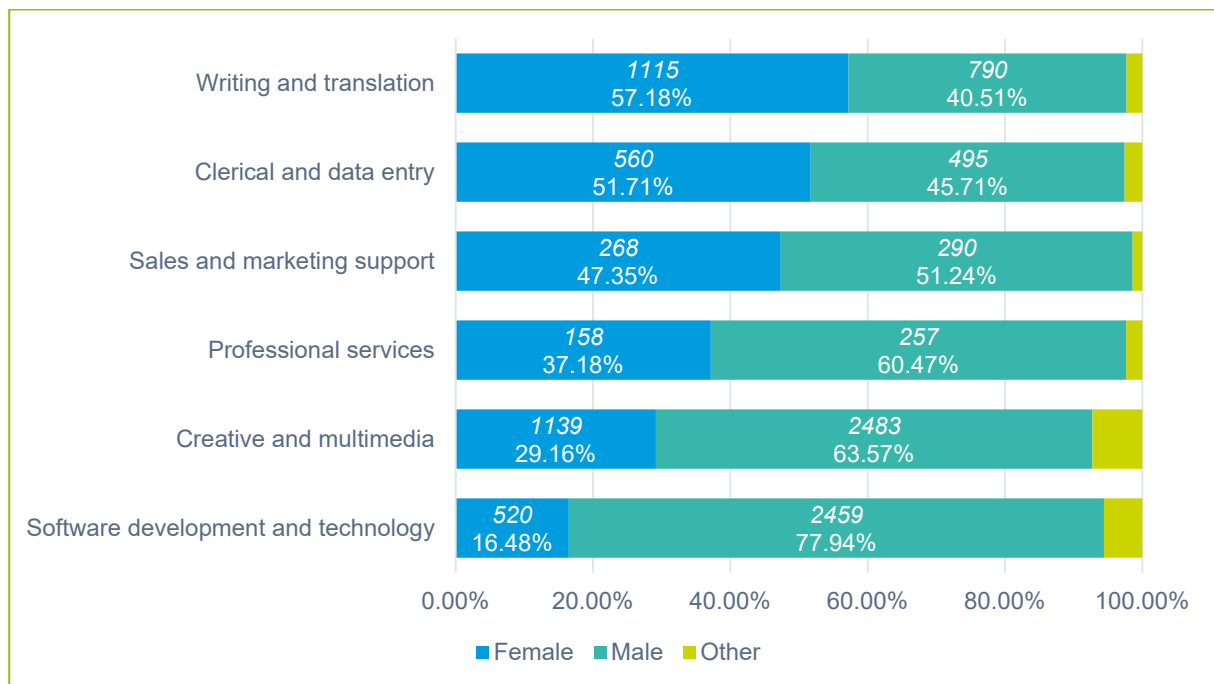
The data also revealed that Serbian men were 1.8 times more likely than their female counterparts to register on the four selected platforms. Male online workers dominated all occupations, except for writing and translation and clerical and data entry work, where female workers represented a higher share. In some occupations male dominance was especially strong. For example, male workers were 4.7 times more likely to work in software development and technology, where only 16.5% of workers were female (see the figure below). Similarly, men were 2.2 times more likely to engage in creative and multimedia work than Serbian females.

<sup>92</sup> Interview with the Upwork Ambassador for Serbia, date 2021, 12-29

<sup>93</sup> Anđelković, B., Jakobi, T., Ivanović, V., Kalinić, Z., Bogičević, M., Lundin, S. & Radonjić, Lj. (2020). *Gigmeter*. <http://gigmeter.publicpolicy.rs/>

<sup>94</sup> Anđelković, B., Jakobi, T., Ivanović, V., Kalinić, Z., Bogičević, M., Lundin, S. & Radonjić, Lj. (2020). *Gigmeter*. <http://gigmeter.publicpolicy.rs/>

**Figure 4. Gender of registered Serbian platform workers on four selected platforms, by occupation (November 2021)**



Note: “Other” category shows worker profiles for which gender could not be identified.

Overall, this shows that women in Serbia are significantly underrepresented in occupations that are better paid and in greater demand. This was the case before COVID-19 and the pandemic has only accelerated this trend by facilitating a surge in ‘male’ occupations. This was chiefly driven by women’s skill sets and the occupations they populated. Their previous offline choices in selecting professions that tended to be less well-paid determined their online occupations and consequently their financial success on the platforms.<sup>95</sup>

Desk research also confirmed that in the field of tutoring and translation, remote work is relatively gender balanced. A survey of the Association of Internet Workers<sup>96</sup> showed that in Serbia, women (49.2%) and men (50.8%) are equally involved. When considering all occupations in which remote work is present (creative and multimedia, professional services, software development and tech, writing and translation, sales and marketing support, and clerical and data entry) women accounted for 35.4% of the entire freelancer population.<sup>97</sup> A similar share of women was recorded in the four selected platforms by the automatically collected data in November 2021 (women represented 33.7% of all registered workers).

Nevertheless, the Gigmetar™ data from August 2021 revealed an interesting finding. One-third of all female remote workers had no previous experience (meaning they had not previously worked on any projects on the platform), whilst two-thirds did have some experience.<sup>98</sup> Similar percentages were found for male freelancers, where one-third also had no experience and two-thirds had worked on projects on the online marketplace. This result is significant because it deviates from the traditional labour market pattern where women find it more difficult to get work and are much more likely to be unemployed. It also shows the potential of platform work to become more inclusive than the traditional labour market.

<sup>95</sup> Anđelković, B., Jakobi, T., Ivanović, V., Kalinić, Z., Bogičević, M., Lundin, S. & Radonjić, Lj. (2020). *Gigmetar*. <http://gigmetar.publicpolicy.rs/>

<sup>96</sup> Interview with the Digital Community Serbia representative, date 12-01, 2022

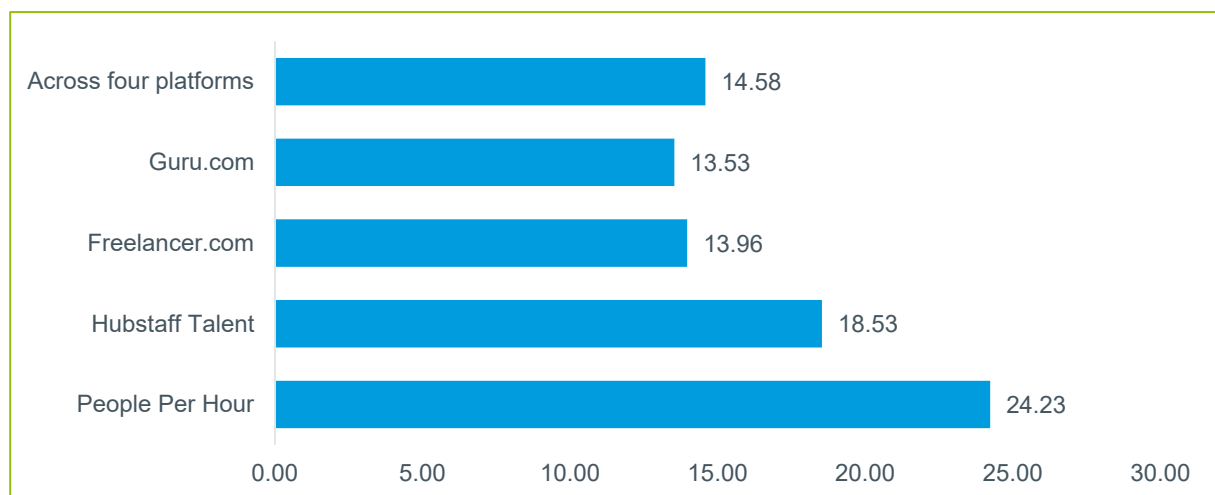
<sup>97</sup> Anđelković, B., Jakobi, T., Ivanović, V., Kalinić, Z., Bogičević, M., Lundin, S. & Radonjić, Lj. (2020). *Gigmetar*. <http://gigmetar.publicpolicy.rs/>

<sup>98</sup> Anđelković, B., Jakobi, T., Ivanović, V., Kalinić, Z., Bogičević, M., Lundin, S. & Radonjić, Lj. (2020). *Gigmetar*. <http://gigmetar.publicpolicy.rs/>

The collected evidence confirms that platform workers are generally young, particularly those engaged in remote work. About 60% of respondents to the Association of Internet Workers survey were between 18 and 35 years old, while the remaining 40% were older. The largest concentration of workers was found in the group of 26 to 35-year-olds (51%).<sup>99</sup> Most of the remote workers (80%) had tertiary or higher education.<sup>100</sup>

Remote online workers earn above the average wage in Serbia, while considering all other factors being equal and provided that they work full-time the whole month or 40 hours per week. In December 2021, the average wage was RSD 102,196 gross and RSD 74,629 net.<sup>101</sup> This corresponds to USD 960 and USD 700 per month, or around USD 6 and USD 4.4 per hour, respectively. Meanwhile, based on automatically collected data the average hourly rate demanded by Serbian online workers was USD 14.6 in November 2021. The average rate significantly varied across the four selected platforms, ranging from USD 13.5 on Guru.com to USD 24.2 on PPH. On all four platforms, men tended to demand higher hourly rates than female freelancers in Serbia. Considering all registered workers, female workers on average demanded USD 13.7 while male workers demanded USD 15.2. A gender pay gap was found in all occupations except for sales and marketing support, in which women requested around one dollar more than male workers.

**Figure 5. Average hourly rate in USD demanded by Serbian platform workers, by platform (November 2021)**



Out of all registered workers, the highest hourly rates were demanded by Serbians providing sales and marketing support (USD 17.4). The lowest hourly rate was demanded by workers in writing and translation as well as clerical and data entry tasks, USD 12 and USD 9.9, respectively. The high share of female workers in these two occupations could partially explain the low hourly rates recorded among all registered female freelancers on the four selected platforms. It is important to note that the

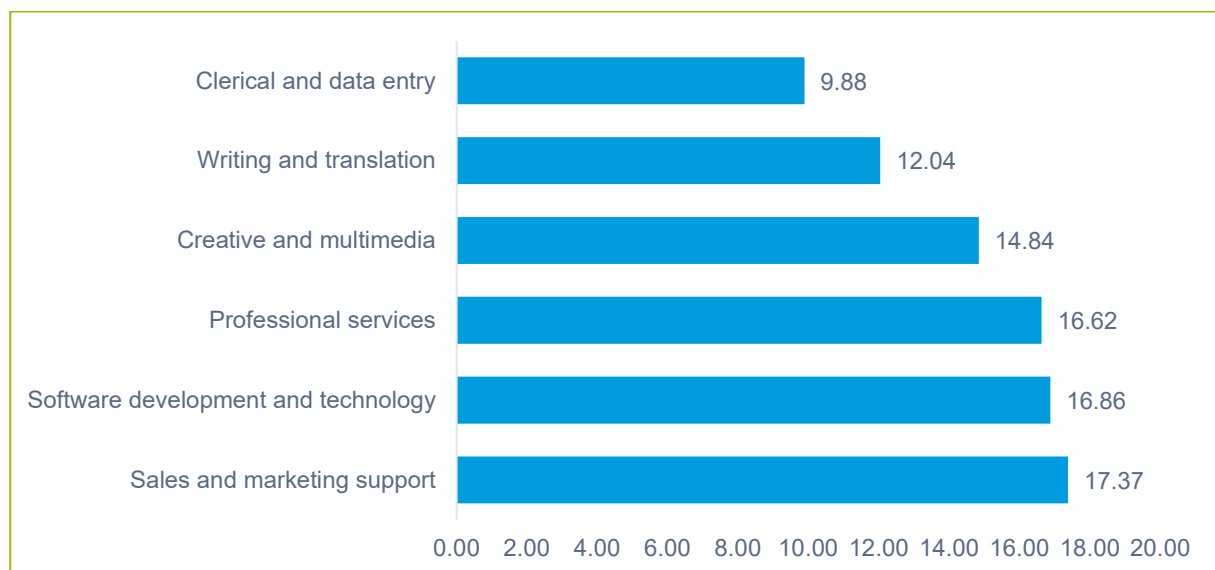
<sup>99</sup> Andjelkovic, B. Jakobi, T. & Kovac, M. (2021). Decent or not? The socio-economic position and status of global platform digital workers from Serbia. In Fetsi, A., Bardak, U. & Rosso, F. (Eds.) *Changing skills for a changing world. Understanding skills demand in EU neighbouring countries*. Turin: European Training Foundation (ETF). Retrieved from [https://www.etf.europa.eu/sites/default/files/2021-02/changing\\_skills\\_for\\_a\\_changing\\_world\\_2.pdf](https://www.etf.europa.eu/sites/default/files/2021-02/changing_skills_for_a_changing_world_2.pdf); Internet radnici Srbije. (2021). Rezultati ankete o frilenserima u Srbiji. Retrieved February 2022 from <https://irsrbije.rs/2021/10/16/rezultati-ankete-o-frilenserima-u-srbiji/>

<sup>100</sup> Andjelkovic, B. Jakobi, T. & Kovac, M. (2021). Decent or not? The socio-economic position and status of global platform digital workers from Serbia. In Fetsi, A., Bardak, U. & Rosso, F. (Eds.) *Changing skills for a changing world. Understanding skills demand in EU neighbouring countries*. Turin: European Training Foundation (ETF). Retrieved from [https://www.etf.europa.eu/sites/default/files/2021-02/changing\\_skills\\_for\\_a\\_changing\\_world\\_2.pdf](https://www.etf.europa.eu/sites/default/files/2021-02/changing_skills_for_a_changing_world_2.pdf); Internet radnici Srbije. (2021). Rezultati ankete o frilenserima u Srbiji. Retrieved February 2022 from <https://irsrbije.rs/2021/10/16/rezultati-ankete-o-frilenserima-u-srbiji/>

<sup>101</sup> Statistical Office of the Republic of Serbia (2022). *Average salaries and wages per employee, December 2021*. Belgrade: Statistical Office of the Republic of Serbia. Retrieved from <https://publikacije.stat.gov.rs/G2022/HtmIE/G20221047.html>

requested hourly rates on platforms might not reflect the actual earnings of the people working through remote labour platforms.

**Figure 6. Average hourly rate in USD demanded by Serbian platform workers on four selected platforms, by occupation (November 2021)**



In terms of motivation, Gigmatar’s studies and reports have evidenced that regardless of the type of work they perform, platform workers, praise the good pay, flexibility and independence offered by platform work. The opportunity to manage their own time, work at their own pace, and be their own boss were the most common advantages singled out by platform workers. Unlike in many countries, platform workers in Serbia are mainly locals. However, this has been changing lately as the domestic labour shortage grows.

Research in Serbia has also shown that, both on-location and online platform work tends to be the main, full-time job for participants in the majority of cases. However, there is one important difference: while for remote workers it is usually a long-term engagement, for on-location workers this is a transitory occupation.<sup>102</sup> Remote platform workers are usually younger, have tertiary education, are literate in foreign languages and equipped with considerable IT and other soft skills. This group represents workers both with and without a previous working history in the traditional economy and with experience holding traditional types of contracts in the past.<sup>103</sup>

Remote platform workers give precedence to the acquisition and development of new skills that widen their possibilities to find better-paid gigs.<sup>104</sup> Skills development and career opportunities are the sole responsibility of the platform worker. According to the representative of Digital Community Serbia, “for remote workers in-work skills developments are almost a mandatory requirement if they want to be competitive on the labour market”.<sup>105</sup> The nature of their work inevitable involves learning new skills

<sup>102</sup> Andjelkovic, B. Jakobi, T. & Kovac, M. (2021). Decent or not? The socio-economic position and status of global platform digital workers from Serbia. In Fetsi, A., Bardak, U. & Rosso, F. (Eds.) *Changing skills for a changing world. Understanding skills demand in EU neighbouring countries*. Turin: European Training Foundation (ETF). Retrieved from [https://www.etf.europa.eu/sites/default/files/2021-02/changing\\_skills\\_for\\_a\\_changing\\_world\\_2.pdf](https://www.etf.europa.eu/sites/default/files/2021-02/changing_skills_for_a_changing_world_2.pdf); Andjelkovic, B., Jakobi, T., Kovac, M., & Golusin, S. (Forthcoming). *Fairwork Serbia Ratings 2021: Labour Standards in the Platform Economy*. Oxford: Fairwork Foundation

<sup>103</sup> Andjelkovic, B., Sapic, J., & Skocajic, M. (2019). *Digging into Digital Work in Serbia: Who are Crowdworkers from Serbia and Why They Work on Global Digital Platforms*. Belgrade: Public Policy Research Centre. Retrieved from <https://publicpolicy.rs/publikacije/961581c6008514f57a7635bbdf8c7bc1cbe24fea.pdf>; Andjelkovic, B., Jakobi, T., Kovac, M. & Golusin, S. (2020). *A Hell of a Ride: The Prospects of Decent Work on Digital Delivery and Ride-hailing Platforms in Serbia*. Belgrade: Public Policy Research Center. Retrieved from <https://publicpolicy.rs/publikacije/d438466224abe8359006dae5dfec80fe10a71269.pdf>

<sup>104</sup> Andjelkovic, B., Jakobi, T., Kovac, M. & Golusin, S. (2020). *A Hell of a Ride: The Prospects of Decent Work on Digital Delivery and Ride-hailing Platforms in Serbia*. Belgrade: Public Policy Research Center. Retrieved from <https://publicpolicy.rs/publikacije/d438466224abe8359006dae5dfec80fe10a71269.pdf>

<sup>105</sup> Interview with a Digital Community Serbia representative, date 2022-01-12

and problem solving. Nevertheless, the evidence has shown that career advancement prospects in online platform work are very weak.

Informality is rather high among remote workers who report that in 94% of cases they are not concluding any contract or that agreements they make do not have any significance in the Serbian legal system.<sup>106</sup> Remote online workers in Serbia can only register as self-employed or establish limited liability companies, which is too expensive in most cases due to tax burdens.<sup>107</sup> This is discussed in more detail in the following chapter.

## On-location platform work

On-location platform work in Serbia is a newer trend which emerged in 2014, but gained prominence as of 2018 and throughout the COVID-19 pandemic.<sup>108</sup> While no official statistics on the number of on-location platform workers in Serbia exists, in 2020 it was estimated that around 3,000 workers were employed on the leading three food delivery platforms in Belgrade.<sup>109</sup> As of early 2022, this number has undoubtedly grown based on the increased interest in platforms. Consequently, this has led to a widening of workers' scope of work, which, in February 2022, covered not only restaurants, but also supermarkets, pharmacies and beauty chains, as well as the individual needs of buyers across different shopping categories and increased city coverage.<sup>110</sup> Platforms have actively expanded their presence from three cities to 26 urban locations in 2021, as Glovo's case shows, for example.<sup>111</sup>

Since the pandemic started, the most popular platforms have been food-delivery applications, followed by ride-hailing services. Local, on-location platforms have dominated the domestic market for some time, until international platforms entered the Serbian market. The rapid expansion of on-location platforms has resulted in worker shortages, while the demand for such services is increasing.

On-location platform workers also rely on social networks to find employment on platforms. Just as among the remote platform workers, discussions about on-location platforms occur on Viber, WhatsApp, or Facebook groups, where on-location platform worker can learn about the advantages and disadvantages of working for particular a platform or mobile app. Similarly to freelancers, on-location platform workers are also counselled by other workers, or "tutors", on which platforms to begin their work.

Prior to 2022, delivery riders learned about on-location platform work opportunities through promotional campaigns carried out by the platforms. According to the testimony of one of the interviewees, "in early days there was very little information on how to get a gig for Glovo, Wolt or Donesi. Usually, it would be someone from your network who would inform you about the work opportunities. Some platforms were so popular that you needed to have connections to get in."<sup>112</sup> As of early 2022, the situation was the opposite, as food delivery platforms reported shortages of workers.

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<sup>106</sup> Internet radnici srbije. (2021). Rezultati ankete o frilenserima u Srbiji. Retrieved February 2022 from <https://irsrbije.rs/2021/10/16/rezultati-ankete-o-frilenserima-u-srbiji/>

<sup>107</sup> Andjelkovic, B., Jakobi, T. & Kovac, M. (2021). Decent or not? The socio-economic position and status of global platform digital workers from Serbia. In Fetsi, A., Bardak, U. & Rosso, F. (Eds.) *Changing skills for a changing world. Understanding skills demand in EU neighbouring countries*. Turin: European Training Foundation (ETF). Retrieved from [https://www.etf.europa.eu/sites/default/files/2021-02/changing\\_skills\\_for\\_a\\_changing\\_world\\_2.pdf](https://www.etf.europa.eu/sites/default/files/2021-02/changing_skills_for_a_changing_world_2.pdf)

<sup>108</sup> Andjelkovic, B., Jakobi, T., Kovac, M., & Golusin, S. (Forthcoming). *Fairwork Serbia Ratings 2021: Labour Standards in the Platform Economy*. Oxford: Fairwork Foundation.

<sup>109</sup> Andjelkovic, B., Jakobi, T., Kovac, M. & Golusin, S. (2020). *A Hell of a Ride: The Prospects of Decent Work on Digital Delivery and Ride-hailing Platforms in Serbia*. Belgrade: Public Policy Research Center. Retrieved from <https://publicpolicy.rs/publikacije/d438466224abe8359006dae5dfec80fe10a71269.pdf>.

<sup>110</sup> Andjelkovic, B., Jakobi, T., Kovac, M., & Golusin, S. (Forthcoming). *Fairwork Serbia Ratings 2021: Labour Standards in the Platform Economy*. Oxford: Fairwork Foundation

<sup>111</sup> Mudrinic, M. (2021). Glovo dostavljačima zarada od 500 do 600 evra – strani dostavljači rade u skladu sa zakonom [Web log]. Retrieved February 2022 from <https://www.netokracija.rs/glovo-zarada-191186>

<sup>112</sup> Interview with an on-location platform worker working through Glovo, date 2021, 11-28 (the interview was organized for the Fairwork project in Serbia).

Important factors that determine the popularity of on-location platforms reported by workers include the pay per delivery, fixed rate in case of no delivery, opportunity to “log-off” from the platform whenever they liked, the value of financial bonuses available, and the opportunity to instantly get support from the platform call centre. Overall, those engaged in on-location platform work either cherish the opportunity to monetise existing skills (e.g., driving) or describe their job as requiring almost no skills besides driving and using a mobile app.<sup>113</sup> The latter especially value the opportunity to leave the work behind once when they log-off from the app, which was not possible while they were in traditional employment.<sup>114</sup>

As of early 2022, the most popular on-location platforms were two food delivery applications and one ride-hailing app, namely Wolt, Glovo and CarGo. The champion of popularity in the country until recently was a veteran platform on the food delivery market called Donesi.com. In July 2021, the platform was acquired by the Spanish food delivery company Glovo, operating through its mobile app. In January 2022, the Donesi.com management team established Mister D, a new local delivery platform, which will most likely influence the ratings of the other two in terms of popularity. Platforms with services facilitating domestic work are on the rise, with Uradi-zaradi being the leader in the market. This national digital platform operates in three cities: Belgrade, Novi Sad and Kragujevac.

On-location platform workers are either slightly older than their peers working remotely, usually with secondary education, or students. They also have considerable experience in both formal and informal work. Many of these workers either lost their job due to the Covid-19 pandemic or left a regular job because they were attracted to above average pay on food delivery or ride hailing platforms.<sup>115</sup> For them, on-location platform work is a full-time job in the majority of cases.

In contrast to remote platform work, on-location platform work totally lacks the skills development dimension.

As presented in more detail in the following chapter, on-location workers are often engaged as self-employed and the contracts are regulated by the corporate law. They pay a lump-sum tax depending on their registered address and enjoy social protection benefits and health care. Moreover, on-location workers often form small alliances where several workers work under the registration of one sole trader who then pays the others in cash. The latter are stripped of any kind of health or social protection benefits and have no insurance coverage in the case of injury.

On-location workers can also engage through intermediary companies (usually registered as an LLC for postal and courier services). In this case they sign standard labour contracts and can enjoy other rights stemming from standard employment. However, contracts are often signed for a minimum number of working days (e.g., 2 days or 16 hours per week). This is common for both ride-hailing and food delivery platforms. In this scenario they receive their contracted pay into their bank account and the remaining amount for additional days worked is paid in cash. Given that some riders work more than 50 hours per week, a considerable sum of money is not being declared in most cases.<sup>116</sup>

Some riders sign so called “additional employment contracts” intermediaries and workers. These contracts exclude the healthcare but include social security benefits. According to the Labour Law, this can be used in the case of supplementary work carried out by employees who already have a full-time job with another employer.<sup>117</sup> Due to the weak oversight mechanisms of intermediary agencies, the validity of on-location workers’ contracts is not monitored. Generally, platforms should only accept workers who have a contract with these agencies. In reality, neither platforms nor the Labour

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<sup>113</sup> Andjelkovic, B., Jakobi, T., Kovac, M. & Golusin, S. (2020). *A Hell of a Ride: The Prospects of Decent Work on Digital Delivery and Ride-hailing Platforms in Serbia*. Belgrade: Public Policy Research Center. Retrieved from <https://publicpolicy.rs/publikacije/d438466224abe8359006dae5dfec80fe10a71269.pdf>

<sup>114</sup> Andjelkovic, B., Jakobi, T., Kovac, M., & Golusin, S. (Forthcoming). *Fairwork Serbia Ratings 2021: Labour Standards in the Platform Economy*. Oxford: Fairwork Foundation.

<sup>115</sup> Andjelkovic, B., Jakobi, T., Kovac, M., & Golusin, S. (Forthcoming). *Fairwork Serbia Ratings 2021: Labour Standards in the Platform Economy*. Oxford: Fairwork Foundation.

<sup>116</sup> Kirov, V., Andjelkovic, B., Jakobi, T. & Kosheva, M. (Forthcoming) *Is there decent work in the online food delivery business? Case studies of Bulgaria and Serbia*.

<sup>117</sup> Dubajic Law. (2019). Employment contract and other forms of engaging employees in Serbia [Web log]. Retrieved February 2022 from [shorturl.at/buxFN](http://shorturl.at/buxFN)

Inspectorate check whether these workers hold valid contracts. After the expiry of the contract, the third party often fails to renew it.<sup>118</sup> In addition to this, some intermediaries deregister workers from the Pension and Disability Insurance Fund after a couple of months. In this case, workers continue to receive salary, but their contributions are not paid. This clearly points to a lack of enforcement within the employment regulatory framework under which platform workers tend to be considered in Serbia.

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<sup>118</sup> Andjelkovic, B., Jakobi, T. Kovac, M., & Golusin, S. (Forthcoming). *Fairwork Serbia Ratings 2021: Labour Standards in the Platform Economy*. Oxford: Fairwork Foundation.

# CURRENT REGULATION, POLICIES AND STRATEGIC APPROACHES

## New forms of employment and platform work

New forms of employment and platform work are becoming a serious challenge for legislators, employers, and trade unions. While the EU has taken considerable steps in regulating at least some aspects of sub-types of this work either through various directives<sup>119</sup>, specific national legislations and the work of courts, Serbia is only in the early stages of this process. New and atypical forms of work are not at the top of the agenda of policy makers and regulators in Serbia. Contractual arrangements outside of standard employment are recognised by the Labour Law (2005) only in rudimentary form. Therefore, detailed classification and contextualisation of new forms of employment are still not present in Serbia.

Most platform workers, providing both remote and on-location services, are not classified as standard employees (see the table below). The rights of those in standard (open ended or fixed term) employment are regulated by the Labour Law. Other forms of employment are only mentioned in Labour Law but then regulated elsewhere, for example under Corporate Law, or the Law of Contracts and Torts. This legislation then provides a base for other rights such as pension and healthcare provisions. Many rights, such as minimum wage, collective bargaining, and social benefits in case of unemployment, are only linked to standard employment contracts. People on temporary or seasonal work contracts, service contracts, agency contracts, vocational training and advanced training contracts and supplementary work contracts were not covered by the government's stimulus and anti-dismissal measures during the Covid-19 pandemic.

**Table 1. Labour market statuses of platform workers**

Labour market status of a person	Does it fall under the Labour Code or Civil Law?	What type of contracts can they conclude?	Are the social security/ healthcare contributions obligatory?	Is it a common status among platform workers?
<b>Employed</b>	Labour Code	Full-time and part-time employment contracts	Yes, payment obligations are split between the employee and employer	No
<b>Self-employed</b>	No such status in the Serbian legal system. Treated as entrepreneurs under Corporate Law	No contracts required	Yes, entrepreneurs pay themselves	Yes, for both remote and on-location
<b>Outside employment</b>	Mentioned in Labour Law, but regulated through Law on obligations, Law on Personal Income Tax, Law on Seasonal Workers	Service contracts, seasonal contracts, vocational training and advanced training contracts, additional work contracts	Yes, paid by employer	Rarely. Some remote and on-location workers have service contracts, some on-location workers have additional work contracts.

<sup>119</sup> Directive 2019/1152 (EU) 2019/1152 of the European Parliament and of the Council of 20 June 2019 on transparent and predictable working conditions in the European Union, the Draft Directive on improving working conditions in platform work, A Proposal for a Regulation of the European Parliament and of the Council Laying Down Harmonised Rules on Artificial Intelligence (Artificial Intelligence Act) and Amending Certain Union Legislative Acts COM/2021/206 final including role of AI in governing labour relations).



According to the Law on Personal Income Tax, every resident of the Republic of Serbia (a person who resides there or stays in Serbia for 183 days or more over a period of 12 months) must pay taxes, regardless of where the employer or the worker were when they did the job. This encompasses those working through international digital labour platforms remotely. Based on this, the Serbian Tax Authorities tried to collect unpaid taxes from platform workers who worked informally or evaded paying taxes by registering as self-employed over the last five years. This provoked protests in late 2020 and led to once-off concessions in favour of platform workers.<sup>120</sup>

In April 2021, the government agreed to form a working group tasked with suggesting solutions to better suit platform workers either through amendments to the Personal Income Tax Law and the Law on Compulsory Social Security Contributions or through the adoption of a new law that would regulate flexible forms of work.<sup>121</sup> In September 2021, the government established a Working Group for Internet Workers which is mandated to achieve this goal.<sup>122</sup> The group consists of government bodies, various associations of remote (internet) workers, and two research organisations. So far, the issue of internet freelancing has only been viewed from the tax perspective. People working as freelancers are still treated as entrepreneurs and not workers who should enjoy various labour rights. At the same time, the matter has so far been viewed as an isolated occurrence and not as a part of a broader phenomenon of new and atypical forms of work.

Labour experts argue that most government measures to address new forms of employment do not contain mechanisms to suppress undeclared work and favour the employer as opposed to the employee. Government policies are often blamed for low quality employment and precarious contracts offered by the employers in Serbia. As of 2020, the share of vulnerable employment was around 24% which was an improvement on past figures when it lingered at around 28%. However, this is still well above the EU average of 14%.<sup>123</sup>

The poor position of workers is exacerbated by the legislation which allows for flexible interpretation of the rules by employers, to which they often resort. Therefore, changes to the current Labour Law are perceived to be of paramount importance in the direction of regulating new and atypical forms of work, including platform work. These changes have been delayed several times and are expected to commence in late 2023.

## Skills and employability

The Serbian government has made several attempts to address the issues related to digitalisation and changing labour demands. However, these attempts have lacked coherence and a clear strategic goal. The mismatch of skills, particularly digital ones, was addressed by the Strategy for Digital Skills Development in the Republic of Serbia (2020-2024) and further supported by numerous projects aimed at improving the in digital skill levels of school-aged youth. On the other hand, life-long learning policies and measures are fragmented. Active Labour Market Programmes have limited outreach and coverage and do not cover workers in non-standard employment arrangements.

In 2021, the government introduced a new National Employment Strategy for the period 2021-2026, “which defines reform steps aimed at establishing an efficient labour market in line with the accelerated technological development”.<sup>124</sup> The Strategy should support creation of “quality

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<sup>120</sup> Zuniclaw (2021). The agreement between the government and freelancers: end of the fight or just the first round? [Web log]. Retrieved February 2022 from <https://zuniclaw.com/en/freelance-taxation-in-serbia/>

<sup>121</sup> Zuniclaw. (2021). The agreement between the government and freelancers: end of the fight or just the first round? [Web log]. Retrieved February 2022 from <https://zuniclaw.com/en/freelance-taxation-in-serbia/>

<sup>122</sup> Vlada predložila frilenserima formiranje radne grupe. (2021, September 28). *Danas*. Retrieved February 2022 from <https://www.danas.rs/vesti/drustvo/vlada-predlozila-frilenserima-formiranje-radne-grupe/>

<sup>123</sup> Aleksić, D., Arandarenko, M., Ognjanov, G. (2020). *Ex post analysis of the national employment strategy for the period 2011-2020*. Belgrade: Foundation for the Advancement of Economics. Retrieved from [shorturl.at/nvF67](http://shorturl.at/nvF67)

<sup>124</sup> The Government of the Republic of Serbia. (2021, February 25). New employment strategy for more efficient labour market [Press release]. Retrieved February 2022 from <https://www.srbija.gov.rs/vest/en/168387/new-employment-strategy-for-more-efficient-labour-market.php>

employment through cooperation of various sectors including education, the economy, finances, social protection and local self-governments”.<sup>125</sup>

Notwithstanding, labour market and skills development policies or measures to respond to the new employment trends are largely not in place. One of the measures in the Action Plan for 2021-2023 is related to the piloting of the elements of the Youth Guarantee Programme. This programme builds upon the much more modest measure introduced in 2013, known as the “Youth Service Package”. The package envisaged the development of an individual employment plan for each person and much more intensive cooperation between the advisors of the National Employment Service and unemployed youth. The Youth Guarantee will be adopted gradually and in selected parts of the country due to limited human resources, insufficient financial resources, and a large number of young people registered with the National Employment Service.<sup>126</sup>

As of early 2022, another programme “From School to Work” has been implemented by the National Employment Service (NES). The programme aims to pilot a model of mediation between the needs of employers and the system of non-formal education in selected cities in Serbia. The goal of the programme is to improve the employability of ‘hard-to-employ’ youth and develop their skills in accordance with the needs of employers. The target group consists of young people aged 15-30, as well as persons up to age 35 if they belong to a vulnerable category. The project provides services for young people, such as career guidance, counselling, and on-the-job training, as well as services for employers, for example assessment of competencies and selection of persons, training of mentors, analysis of missing skills and development of curricula for on-the-job training.

A recently introduced project titled “My First Salary” aims to address youth unemployment and the long transition from school to work. Among notable measures of this project, the ‘professional practice’ should match young people and prospective employers and address the gap between the information learned at university and skills applicable to the workplace. The project is run by the NE, Ministry of Labour, Employment, Veteran and Social Affairs, Ministry of Finance, Office for IT and e-Government and the Serbian Chamber of Commerce.

## Digitalisation and digital skills

The Strategy for Digital Skills Development in the Republic of Serbia (2020-2024) aims to address various gaps in digital literacy. The Ministry of Trade, Tourism and Telecommunications supports numerous projects contributing to improving the digital skills levels. Some of these programs were specifically tailored to vulnerable groups with the aim of increasing their digital literacy<sup>127</sup> and employability.

Since 2017, digitalisation, the digital transition of the economy, and consequently the acquisition of digital skills have been priorities for the government.<sup>128</sup> Prior to the Covid-19 pandemic, significant progress had been made in the area of education through substantial regulatory changes as well as the introduction of digital and adjusted textbooks and the broader use of digital tools in teaching.

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<sup>125</sup> The Government of the Republic of Serbia. (2021, February 25). New employment strategy for more efficient labour market [Press release]. Retrieved February 2022 from <https://www.srbija.gov.rs/vest/en/168387/new-employment-strategy-for-more-efficient-labour-market.php>

<sup>126</sup> International Labour organization. (2021). The European Commission and the ILO join forces to support young people [Web log]. Retrieved February 2022 from [https://www.ilo.org/budapest/whats-new/WCMS\\_814788/lang--en/index.htm](https://www.ilo.org/budapest/whats-new/WCMS_814788/lang--en/index.htm); Ognjenovic, K., Kuzmanov, L. & Pavlovic, D. (2020). *Ex-ante analiza strategije zaposljavanja Republike Srbije za period 2021-2026*. Beograd: Vlada Republike Srbije. Retrieved from [https://www.minrzs.gov.rs/sites/default/files/2021-02/7.Ex-ante\\_analiza\\_Final.pdf](https://www.minrzs.gov.rs/sites/default/files/2021-02/7.Ex-ante_analiza_Final.pdf)

<sup>127</sup> Ožegović, J. (2019). *Report on Digital Inclusion in the Republic of Serbia for the Period 2014–2018*. Belgrade: Social Inclusion and Poverty Reduction Unit of the Government of Serbia.

<sup>128</sup> Brnabić, A. (2017, June 28). Keynote address by serbian prime minister designate Ana Brnabić. Belgrade. Retrieved February, 2022, from <https://www.media.srbija.gov.rs/medeng/documents/keynote-address-pm-ana-brnabic280617.pdf>

Informatics and Computer Science is now a mandatory subject for fifth-grade students in Serbia. Schools were supplied with additional computers and teachers went through numerous trainings.<sup>129</sup>

The Strategy for Education Development in Serbia 2020 also highlights the role of ICT in raising the quality of teaching and learning at all levels of education. This confirms the determination of the state to increase the number of IT experts in the country and strengthen the link between IT specialisations and the private sector.<sup>130</sup> This is a welcome step towards improving current trends which show that there is a mismatch between the companies eager to undertake digital transformation and the available workforce.

A recent study based on the analysis of job ads and interviews with HR representatives in companies in Serbia showed that companies see themselves as highly digitalised (2.47 on a scale of 1 to 3) and that their demand for all levels of digital competence had been constantly and proportionally increasing in the past six years. The study also found that employed individuals and those actively seeking work differ significantly in only two competencies - solving technical problems and recognising the impact of digital technologies on the environment.<sup>131</sup> Interviews with HR representatives suggested that the formal education of job candidates is not sufficient for career advancement because a large number of required competencies are not included in formal education programmes, including interpersonal, cognitive and systems skills.<sup>132</sup>

The COVID-19 crisis highlighted the need for digital skills, which steered the government for example to formulate a pilot programme for machine learning in primary education.

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<sup>129</sup> Ožegović, J. (2019). *Report on Digital Inclusion in the Republic of Serbia for the Period 2014–2018*. Belgrade: Social Inclusion and Poverty Reduction Unit of the Government of Serbia.

<sup>130</sup> Matović, M. (2021). *Digital competence programs in the Republic of Serbia*. Retrieved from <https://www.osce.org/files/f/documents/d/7/495181.pdf>

<sup>131</sup> USAID. (2022). USAID cooperation for growth project (CFG). Final report on the digital skills study in Serbia. Retrieved from [https://saradnja.rs/wp-content/uploads/2020/04/REPORT\\_DIGITAL-SKILLS-STUDY.pdf](https://saradnja.rs/wp-content/uploads/2020/04/REPORT_DIGITAL-SKILLS-STUDY.pdf)

<sup>132</sup> USAID. (2022). USAID cooperation for growth project (CFG). Final report on the digital skills study in Serbia. Retrieved from [https://saradnja.rs/wp-content/uploads/2020/04/REPORT\\_DIGITAL-SKILLS-STUDY.pdf](https://saradnja.rs/wp-content/uploads/2020/04/REPORT_DIGITAL-SKILLS-STUDY.pdf)

## POLICY IMPLICATIONS

Digital technologies are creating new jobs and could become income-generating opportunities among social groups, which are usually seen as less advantaged in the labour market - youth, women, older persons, persons with disabilities, as well as people living in remote areas. Some new forms of employment offer many workers a low barrier to entry into employment, the opportunity for skills development, and the possibility to better balance work and family life. At the same time, many workers find themselves in an undesirable and precarious situation due to the unpredictability of their working hours and income in new atypical forms of employment. Alternative working patterns, temporary forms of contractual relationships, alternative places of work or irregular working hours are seen as serious drawbacks.

It can be expected that the current trends related to increased digitalisation and flexibility of employment relationships will continue in the future. As a result, a number of policy-relevant issues arise with regards to work organisation and skills demand.

First, workers in new forms of employment are not covered by the existing labour market institutions (i.e., employment protection legislation, wage setting and minimum wage, employment/unemployment benefits, social dialogue). This exacerbates the fragmentation of the labour market between those who are in standard employment and those who are in non-standard employment. For example, if active labour market programmes are not directed towards workers in new forms of employment this may decrease their chances of finding better quality jobs that can liberate them from the vicious circle of precarity. This is particularly pertinent to youth, women, those with lower levels of education and those coming from low-income backgrounds.

Furthermore, the working age population is shrinking, including due to migration. At the same time, a critical mismatch exists between the skills required by employers and those offered by workers. This leaves a number of people in Serbia either with limited employability or in jobs with lower pay. The trend may continue leading to a wider skills polarisation. New types of jobs demanding higher skill levels will emerge, potentially leading to a greater divide between those with advanced skills and those lacking them. Overall, this may result in increased inequality in the Serbian society.

The globalisation of jobs in some sectors (e.g., manufacturing) will also make it harder to generate enough employment opportunities for young people entering the labour market. In addition, these young people will need the right skills to find good jobs either locally or globally, which requires adequate education and constant upgrading of both formal and informal skills, including career management skills.

Some proposed measures to mitigate these challenges could be the following:

- Recognising non-standard forms of employment in the new Labour law and labour market institutions, allowing for consistent access to social protection and health benefits for the workers and preventing precariousness and poor working conditions.
- Introducing processes for validation of non-formal and informal learning, as well as micro credentials for non-standard workers. This would allow for official recognition of credentials acquired, for example, through Massive Open Online Courses (MOOCs) and other non-formal education courses.
- Guaranteeing acceptance and recognition of work acquired through new, non-traditional forms of employment in any kind of contractual relationship in Serbia, whether it is from an employer in the country or registered elsewhere.
- Simplifying the procedures for regulating access to social protection, unemployment benefits, and healthcare for non-standard workers.
- Equipping youth with the right type of skills that would allow them to easily shift from one type of work to another, locally and/or globally.

- Ensuring that all workers have the opportunity to continuously maintain their skills, upskill and/or reskill throughout their working lives through lifelong learning opportunities.
- Carrying out active labour market policy and public employment service reforms, as well as introducing measures to match workers in atypical forms of employment. This could include the provision of career guidance and counselling services for people looking for flexible types of work. While Serbia progresses well in terms of career guidance policy and services, as highlighted in a recent ETF review<sup>133</sup>, inter-ministerial and cross-sectoral cooperation needs to be enhanced to implement the career guidance standards as basis for increasing quality of services and improving competences of providers. Especially, allowing for access to career education in schools aimed at developing career management skills can help reach whole generations and facilitate managing life and careers in changing labour markets.

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<sup>133</sup> ETF (2022) National Career Development Support System Review. Serbia Report  
<https://www.etf.europa.eu/en/document-attachments/career-development-support-system-review-serbia>

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## List of interviews

Organisation	Title	Date of the interview
Upwork	Upwork Ambassador for Serbia	2021-12-29
Freelancer – remote worker	Writer and editor	2022-01-20
Trade Union “Independence”	Associate, International Department Associate, Legal Team	2022-01-21
Serbian Digital Society	Member of the Board	2022-01-12
University of Novi Sad, Faculty of Law	Teaching Assistant, Labour Law	2022-01-20
Faculty of Law, University of Kragujevac	Associate Professor, Labour Law	2021-01-23
Serbian Association of (remote) workers on Internet (URI)	Representative	2022-01-18
Ministry of Labour, Employment, Veteran and Social Policy of the Republic of Serbia	Head of the Department for the Improvement of the Field of Labor and Rights on the Basis of Work in the Country and Abroad, Advisor for professional operational affairs in the field of social dialogue and collective bargaining Employment Adviser	2022-01-11

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