

Mapping the Future of Work: What the future holds for platform workers in Bosnia and Herzegovina

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I. Introduction

A. Background on the online platform economy in the country

The online platform economy has been steadily growing in Bosnia and Herzegovina, with an increasing number of workers engaging in project-based and freelance work through digital platforms. This sector presents both opportunities and challenges for the country's workforce and economy.

Platform workers, also known as gig workers, are a significant part of the labor market in Southeast Europe, which includes Bosnia and Herzegovina. These workers are often found in the digital labor market, providing services on global platforms like Upwork, Freelancer, and Guru. In this region, Upwork tends to be the most popular platform, though Freelancer and Guru also have significant shares.

A project called Gigmetar™ is analysing the trends and characteristics of gig work in this region. This project includes several countries, such as Romania, Serbia, North Macedonia, Montenegro, and Bosnia and Herzegovina, and aims to identify systemic characteristics of the gig work market. The concentration and number of talents in the domain of gig work are particularly noticeable in Romania and Serbia. In relative terms, North Macedonia, Montenegro, and Bosnia and Herzegovina also stand out.

The latest measurements show some changes in the distribution of workers by individual professions. Creative services and multimedia and software development saw a decline in

the relative participation of gig workers. However, there has been dynamic growth in the field of writing and translation in most countries of the region. The average employment of gig workers, defined as the percentage of gig workers who worked on specific projects at the time of measurement in relation to the total population, was 15.4%.

Regarding gender, there has been a decline in the share of female gig workers, with 358 women for every 1000 gig workers. However, the earnings between men and women have been converging, with women in the region earning 85.3% of the average earnings of gig workers, a figure that is significantly ahead of the global average.

A study conducted in late 2020, which included freelancers from Bosnia and Herzegovina, found that gender was not a significant factor for overall work satisfaction. However, older freelancers proved to be more satisfied with the fulfilment of economic and professional expectations, which correlate with years of professional experience. Interestingly, more educated freelancers were generally less satisfied with both groups of drivers - fulfilment of personal life and professional expectations. This understanding of the well-being of freelancers can help policymakers and organization owners better prepare for this model of work in the future. The rapid rise of digitalization, further accelerated by the COVID-19 pandemic, has led to an unprecedented increase in the number of individuals working remotely worldwide. Among these remote workers, a substantial proportion consists of freelancers or self-employed individuals who carry out their work from home. Even though this form of

business activity holds significant relevance in today's project management landscape, the factors influencing the choice to freelance remain largely unidentified.

This study aimed to provide insights into the overall subjective well-being of individuals engaged in freelance work and to examine how it varied with respect to gender, age, and educational background. Conducted in late 2020, the study encompassed 471 freelancers from Serbia, Bosnia and Herzegovina, Macedonia, and Montenegro. These freelancers participated in an online survey to assess their subjective well-being in the context of the "gig" economy.

Factor analysis, the primary statistical method used in the study, led to the identification of two key groups: (1) The influence of remote work on a freelancer's personal life and health, and (2) Satisfaction with economic and professional expectations. The study revealed that gender did not significantly impact overall job satisfaction. However, older freelancers, with their years of professional experience, demonstrated greater satisfaction with the realization of their economic and professional expectations. Interestingly, freelancers with higher education levels expressed less satisfaction with both identified groups - their personal life and professional aspirations.

The study underscores the importance of understanding how the interplay of job types, technological infrastructure, and demographic factors in the region has shaped the well-being of freelancers. This knowledge can guide policymakers, business owners, and aspiring entrepreneurs to effectively navigate this evolving work model.

Furthermore, it allows for the exploration of individual well-being dimensions, which can inform targeted interventions at the country level. This study adds to the existing literature by examining the impact of hybrid work models on the subjective well-being of workers in the "gig" economy.

Because precarious work conditions affect different societal groups in varying ways, it's crucial to consider the intersectionality of class, race, ethnicity, and gender to understand economic and labor market inequalities affecting a diverse workforce.

Historically, precarious working conditions have been linked to disadvantaged groups. The report cites Altenried (2021), who points out that low pay and precariousness are not new phenomena exclusive to digital platforms, but have been defining conditions for migrant and racialized labor for centuries. It is crucial not just to perceive platforms as innovative disruptors of traditional employment, but also to examine how they can recreate and restructure forms of contingent labor.

As such, addressing the precarity of platform work and devising successful strategies to bolster social dialogue require considering the interests and needs of women and/or migrants at the policy level. This necessitates viewing platform work through the lens of an intersectionality-based approach.

This report identifies areas of policy that require further exploration and response in relation to the platform economy. Despite the rapid growth of online platforms and platform work, understanding and regulation remain inadequate.

Future policy strategies should aim for stable income, comprehensive social insurance, and safety measures for all workers, particularly for vulnerable groups like migrants and women. The lack of a legally binding definition for online platforms allows these companies to operate internationally without formal registration or specific tax obligations, as they often serve merely as intermediaries between users. This poses a significant challenge in quantifying and publicly disclosing data such as total turnover and the number of workers or customers.

One potential solution could be the creation of national registries for active platforms, which could collect data on their terms and conditions, revenue, and worker demographics. Given that platform work is likely to persist and expand, there's a need for a better understanding of algorithmic management and its impact on work conditions, which could lead to increased stress, poor work-life balance, and uncertain income.

To develop policy for transparent monitoring and fair decision-making systems, we first need a clear understanding of how algorithmic management varies across platforms for different worker types: employees and the self-employed. As the number of platform workers is projected to rise, future policy should focus on the experiences of migrant and female workers to better understand the opportunities and challenges platform work presents to different societal groups. An intersectional approach can enhance inclusivity in policy-making and social dialogue by better understanding the effects of work digitalization on different workers.

B. Objectives of the report

The primary objectives of this report are to provide a comprehensive overview of the platform economy in Bosnia and Herzegovina, analyze the current state of project and freelance work, and propose policy recommendations to address the needs and concerns of platform workers.

C. Research methodology and data sources

The report is based on a mixed-methods research approach. Quantitative data was collected from the Gigmeter™ platform, providing insights into the size, growth, and demographic profile of platform workers. Qualitative data was obtained through interviews with platform workers and a round table discussion involving multiple stakeholders, offering deeper insights into work conditions, challenges, and potential benefits of the platform economy.

II. Overview of the Platform Economy

A. Definition and scope of the online platform economy

The platform economy encompasses digital platforms that connect workers with employers for project-based or freelance work. These platforms provide a flexible and

decentralized way of working, with tasks ranging from simple gigs to more complex projects.

B. Key characteristics and trends in the country

The platform economy in Bosnia and Herzegovina has witnessed significant growth, driven by the rise of digital technologies and changing workforce preferences. Workers value the flexibility and autonomy that platform work offers, leading to a diverse range of services being offered through these platforms.

C. Comparison with global and regional trends

The platform economy in Bosnia and Herzegovina aligns with global and regional trends, where gig and freelance work have become an integral part of the labor market. However, specific challenges and opportunities unique to the country's context have been identified.

III. Quantitative Analysis (Gigmetar)

A. Size and growth of the platform economy in the country

The scope, trends, and characteristics of gig work in Bosnia and Herzegovina have been analyzed based on Gigmetar™ data, utilizing data¹ collected from the most dominant online platform in Bosnia and Herzegovina, as well as in other Southeast European (SEE) countries that Gigmetar™ monitors.

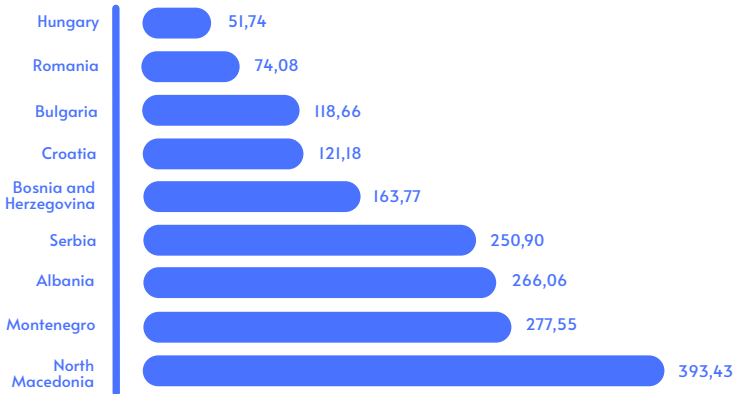
The number of gig workers per capita in Bosnia and Herzegovina has been continuously increasing, as shown by the patterns from the latest 5 measurements by Gigmetar™. Specifically, from the measurement in February 2021 to February 2023, the number of gig workers per capita has risen by about 73%, from 94 to 163 workers per capita. However, in comparison to other countries in Southeastern Europe (SEE), this growth was not as remarkable – even 6 out of 9 SEE countries experienced a more pronounced increase in the number of gig workers per capita than Bosnia and Herzegovina.

It's somewhat interesting to note that the number of gig workers per capita is inversely proportional to the level of development of the observed countries. Indeed, in comparison to other countries, Bosnia and Herzegovina has a moderate number of gig workers per capita. Countries like North Macedonia, Montenegro, Albania, and Serbia have a higher number, while Bosnia and Herzegovina surpasses Croatia,

I. The analysis of characteristics of gig work in these countries are based on the sample composed of 80% of the total number of active digital workers on the Upwork in nine Southeast Europe countries. The data are collected by web scrapping of publicly available information at worker profiles on the selected platform. There are around 20% of people who remain invisible since their profiles are locked for public.

Bulgaria, Romania, and Hungary in this observed indicator.

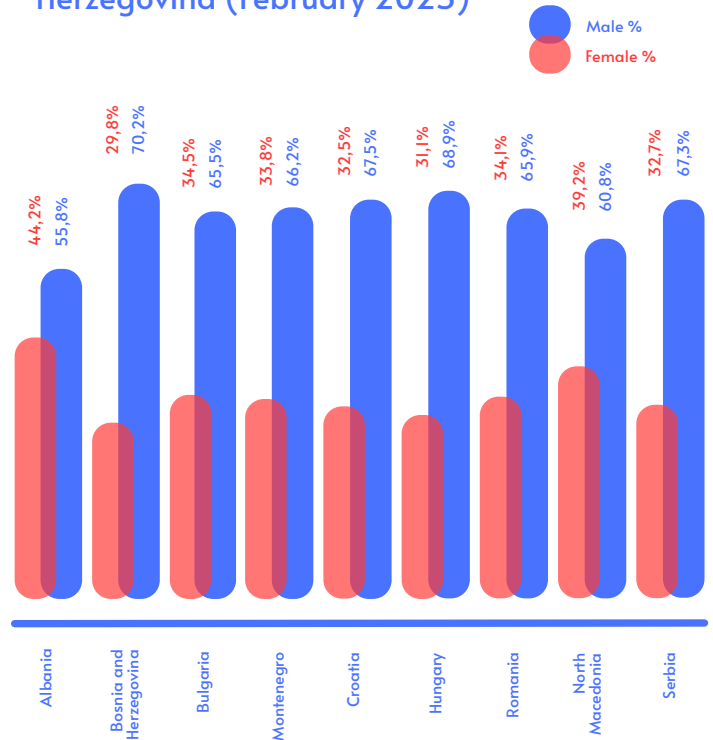
Figure 1: Number of gig workers per 100,000 inhabitants, by country (February 2023)



B. Demographic profile of platform workers

One of the common features of the online platform work in all countries is the overrepresentation of men compared to women as the Figure below. The same Figure shows that in Bosnia and Herzegovina, men dominate online labour to a significant extent. Despite a slight decrease in the proportion of men on the Upwork platform since the first measurement, when men made up about 74.4% of the total workforce, men still represented around 70.2% of the online labour population in Bosnia and Herzegovina in February 2023.

Figure 2: Gender distribution in Bosnia and Herzegovina (February 2023)



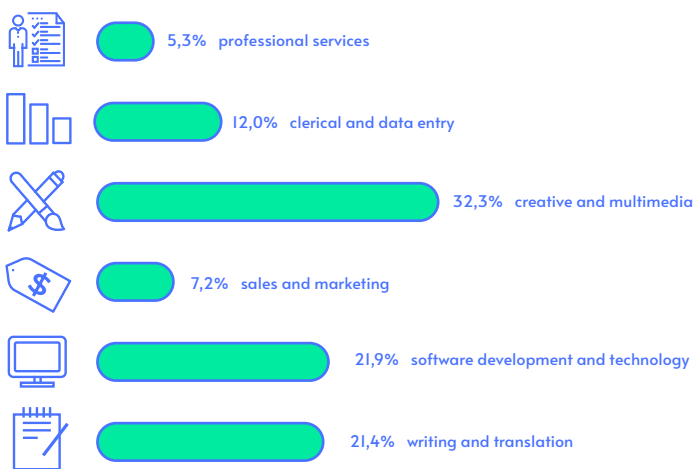
C. Types of platform work and sectors involved

The largest number of gig workers in Bosnia and Herzegovina are engaged in creative services and multimedia - nearly a third of the gig population consists of workers in this job category. Additionally, occupations related to software development, writing, and translation are also quite prominent. The high representation of workers in certain professions can be explained from the perspective of the traditional labor market in Bosnia and Herzegovina, as well as in other SEE countries. Specifically, the significant number of workers in the field of creative services and multimedia is likely a result of both formal and informal education systems

producing a high number of graduates, coupled with the labor market's inability to absorb this large supply of new workforce in the sector. On the other hand, the significant presence of workers in the software development field, observed not only in Bosnia and Herzegovina but also in other countries, is a consequence of the growth of the IT industry and the high demand for IT professionals in the past decade.

The data on workers' representation within specific occupations reflects the strengths and skills of the country's workforce, as well as their economic and political environment. For instance, software development, creative services and multimedia, and professional services are considered higher-paid occupations, whereas writing and translation, sales and marketing, and clerical and data entry are regarded as lower-paid professions.

Figure 3: OLI occupations in Bosnia and Herzegovina (February 2023)



D. Income levels and earnings of platform workers

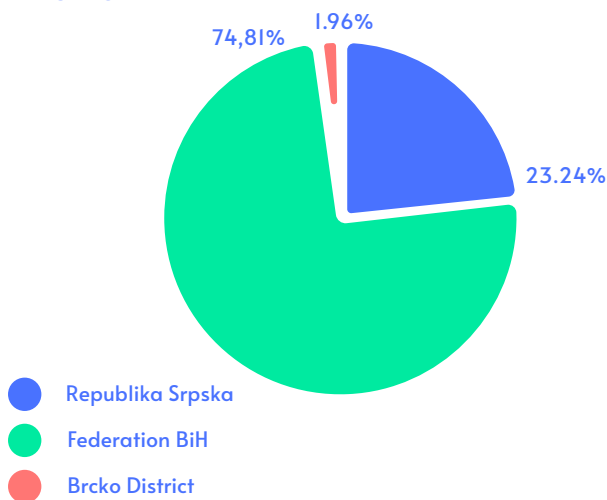
The hourly wage in Bosnia and Herzegovina is among the lowest in comparison to the region. In fact, according to the latest measurement from February 2023, only North Macedonia records a lower hourly wage than Bosnia and Herzegovina. However, when considering the growth of wage rates between the initial measurement (February 2021) and the latest measurement (February 2023), Bosnia and Herzegovina exhibits a more significant growth rate compared to other countries. From February 2021 to February 2023, the average wage rate increased from \$17.70 to \$19.39, representing an approximate 9.6% increase. Only Serbia and Montenegro had higher wage growth rates during this observed period.

However, the high representation of men in the overall gig population, as well as in higher-paying professions, has influenced the average wage level earned by gig workers. In Bosnia and Herzegovina, female gig workers achieve significantly lower average wages compared to their male counterparts. According to the latest measurement, the average wage earned by women in this country is only 80% of the average wage earned by men. A similar situation is observed when considering the level of total earnings achieved by women and men. According to data from February 2023, women in Bosnia and Herzegovina earn only 34.4% of the total earnings achieved by men through work on online platforms.

E. Annex – Regional landscape of gig work in Bosnia and Herzegovina

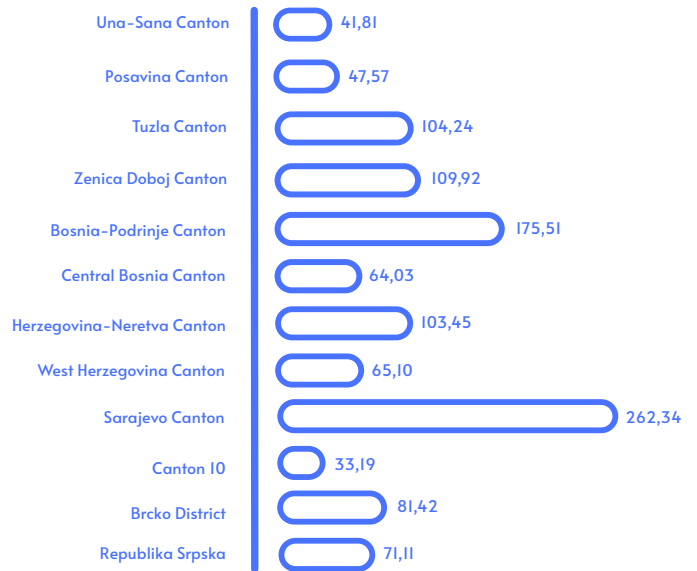
When observing the entities of Bosnia and Herzegovina, it's indicative that the largest portion of the gig population is concentrated within the Federation, while slightly less than a quarter of the total number of gig workers are located in the Republika Srpska, with a negligible share in the Brčko District, which is a territorially small administrative unit.

Figure 4: Distribution by entities and Brcko District



Considering that the Federation is divided into cantons, an analysis of the distribution of gig workforce across these administrative units provides more detailed insights on gig workers' distribution across the country.

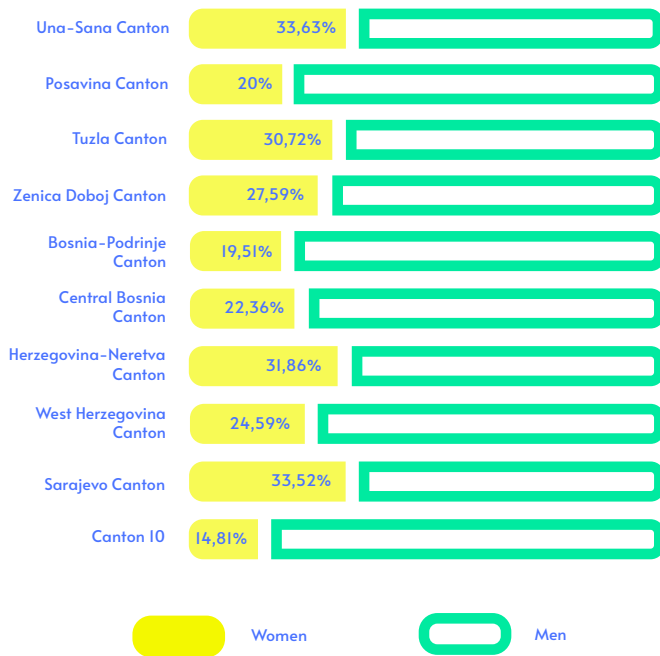
Figure 5: Gig workers per 100,000 inhabitants, by cantons, Brcko District and Republika Srpska



For example, data from the latest measurement indicates that the largest portion of the gig population is concentrated in the Sarajevo Canton - around 262 gig workers per 100,000 inhabitants. Following that are the Bosnian-Podrinje Canton, Zenica-Doboj Canton, Tuzla Canton, and Herzegovina-Neretva Canton with over 100 gig workers per 100,000 inhabitants. The analysis of the regional geography of gig work in Bosnia and Herzegovina also highlights significant disparities in the number of gig workers among administrative units. Specifically, the Sarajevo Canton, as the area with the highest concentration of gig workers per capita, records almost 8 times the number of workers compared to Canton 10.

The dominant representation of men compared to women within the gig

Figure 6: Gender distribution by cantons in Federation



population in Bosnia and Herzegovina is also reflected at the cantonal level. In certain cantons, women constitute a very small portion of the gig workforce - primarily in Posavina Canton (20%), Bosnia-Podrinje Canton (19.51%), and Kanton 10 (14.81%). Una-Sana and Sarajevo represent cantons where women are relatively more represented – yet even in these administrative areas, female gig workers make up only around one-third of the total gig workforce.

IV. Qualitative Analysis (workers interviews + round table)

A. Work conditions and challenges faced by platform workers (interviews)

Platform workers have highlighted the allure of flexibility and perceived platforms as individual business models connecting them with employers. However, they also face challenges such as unpredictable working hours, lack of benefits, and taxation issues.

B. Impact of platform economy on employment (interviews)

The platform economy has had mixed effects on employment in Bosnia and Herzegovina. While it has provided opportunities for income generation and labor market participation, concerns have been raised about job instability and lack of traditional employment benefits.

Abstract

This research sought to understand the experiences, views, and needs of platform workers in Bosnia and Herzegovina. Over a two-month period, we conducted interviews with 20 platform workers from diverse professional and social backgrounds.

Methodology

Our sample comprised 20 platform workers who were selected to represent a range of backgrounds, both professionally and socially. We conducted in-depth interviews to understand their experiences, views, and concerns regarding their work in the gig economy.

Key Findings

- ① **Education and Training:** The majority of the interviewed platform workers possessed higher education credentials. Almost all of them expressed a desire for additional training, both online and offline, to enhance their skills and adapt to the evolving gig economy.
- ② **Multi-platform Work:** Most of the platform workers were working on multiple platforms, a strategy used to maximize their income.
- ③ **Government Intervention:** Many platform workers believe that there is a need for greater government intervention, particularly concerning taxation. In Bosnia and Herzegovina, for instance, platform workers are taxed on their income but do not receive either pension or healthcare benefits.
- ④ **Flexibility of Work:** The flexibility associated with platform work was perceived as one of its most attractive features. The platform workers viewed their roles as part of individual business models connecting workers and employers.
- ⑤ **Work-life Balance:** The majority of platform workers reported that their working hours and

holidays were tied to their work and projects. This makes it challenging for them to plan holidays in advance or refrain from working during holidays.

- ⑥ **Taxation and Benefits:** Almost all the platform workers expressed dissatisfaction with paying taxes and contributions to the government without receiving any benefits in return. They believe this arrangement to be unfair.
- ⑦ **Cooperation Among Platform Workers:** Most platform workers expressed the need for further cooperation among their peers. This was seen as a potential avenue for addressing shared concerns and advocating for their rights.

Conclusion

This research provides valuable insights into the experiences and perspectives of platform workers in Southeast Europe. It highlights the challenges they face, including the need for further education and training, the demand for greater government intervention, and the desire for improved work-life balance. It also underscores the need for collective action and cooperation among platform workers. These findings can inform policy decisions and interventions aimed at improving the conditions and experiences of platform workers in the region.

C. Opportunities and Benefits for Workers and the Economy (Round Table)

The round table discussion revealed that the platform economy can contribute to economic growth and innovation. It offers opportunities for new and diverse services, as well as entrepreneurial prospects for platform workers.

Round Table and Panel Discussion on the Position of Platform Workers in Bosnia and Herzegovina

Date: 18 March 2023

Venue: Children's House, Grbavička bb, Sarajevo

Organizer: Association for Social, Cultural and Creative Development Zora

Report compiled by: Armin Šestić

I. Introduction

The Association for Social, Cultural and Creative Development Zora hosted a roundtable and panel discussion on the position of platform workers in Bosnia and Herzegovina. The event brought together platform workers, associations representing them, and decision-makers to talk about the challenges and opportunities for this emerging workforce segment.

II. Attendees

The event was attended by a diverse group of

participants, including platform workers from various backgrounds, representatives of platform worker associations, and decision-makers from relevant institutions and government bodies.

III. Discussion Topics:

Several key topics were discussed during the roundtable and panel discussion:

A Understanding the Current Situation:

Participants explored the current landscape of platform work in Bosnia and Herzegovina. Key points of discussion included:

1 Rise of Platform Work:

The participants acknowledged the growing prevalence of platform work in the region, which offers new income opportunities but also raises concerns about workers' rights and protections.

2 Diverse Working Conditions:

The discussion highlighted the varying experiences of platform workers. While some appreciated the flexibility of platform work, others raised concerns about unstable employment, low income, lack of social protection, and limited benefits.

3 Need for a Regulatory Framework:

The participants agreed on the need for a robust regulatory framework to govern platform work in the country. They highlighted the current gaps and challenges in the legal and regulatory landscape, such as issues related to worker classification, social protection, and fair labor standards.

④ Importance of Data and Research:

The participants concluded that comprehensive studies are needed to understand the impact of platform work in Bosnia and Herzegovina. They emphasized the importance of gathering insights into the demographics of platform workers, their earnings, working conditions, and overall well-being to inform evidence-based policymaking.

B Rights and Protection for Platform Workers:

The discussion also focused on the rights and protections for platform workers. The participants explored the existing legal and regulatory framework and identified areas for improvement:

① Need for Improved Rights and Protections:

The participants highlighted the need for better safeguards and fair treatment for platform workers, especially in light of their growing numbers.

② Calls for Government Intervention:

Most of the interviewed platform workers felt that the government should intervene more, particularly in terms of taxes. They expressed dissatisfaction about paying taxes without receiving pension or healthcare benefits in return.

③ Need for Platform Worker Cooperation:

The participants also discussed the need for further cooperation among platform workers to better advocate for their rights and protections.

Discussion on Fair and Transparent Working Conditions

The participants underlined the importance of fair and transparent working conditions for platform workers. Key conclusions drawn from the discussion were as follows:

Fair Wages:

Participants recognized the need for fair wages and payment structures for platform workers.

Working Hours and Flexibility:

There was consensus on striking a balance between flexibility and adequate working hours for platform workers.

Worker Protections:

The importance of providing adequate protections for platform workers, including social security benefits and healthcare coverage, was underscored.

Transparent Algorithms and Rating Systems:

Participants expressed concern over the potential for biased or discriminatory practices in algorithms and rating systems used by platform companies.

Collective Bargaining and Representation:

The need for collective bargaining and representation was discussed, with suggestions for innovative approaches such as platform worker associations or unions.

Collaboration with Platform Companies:

Participants emphasized the need for dialogue and engagement with platform companies to advocate for fair and transparent practices.

Discussion on Collaboration

The discussion on collaboration highlighted the opportunities for cooperation among various stakeholders involved in platform work. The conclusions from this discussion include:

Dialogue and Communication:

Participants recognized the need for open and ongoing dialogue between all stakeholders.

Sharing of Information and Data:

The sharing of relevant information and data among stakeholders was seen as essential for developing informed policies and practices.

Developing Code of Conduct or Guidelines:

Participants discussed the potential for developing a shared code of conduct or guidelines for platform work.

Capacity Building and Training:

The need for capacity building initiatives and training programs was emphasized.

Policy Advocacy:

Joint advocacy efforts to influence policy

and regulatory frameworks were highlighted as important.

Pilot Projects and Collaborative Initiatives:

The potential for pilot projects or collaborative initiatives aimed at addressing specific challenges faced by platform workers was discussed.

Future policy directions

Comprehensive Legal Framework:

Participants concluded that it is necessary to develop a comprehensive legal framework specifically addressing platform work, encompassing labor rights, worker protections, fair working conditions, and dispute resolution mechanisms.

Worker Classification:

The importance of accurately classifying platform workers and ensuring they receive appropriate legal protections and benefits was emphasized.

Collective Bargaining and Representation:

Participants highlighted the need to empower platform workers to collectively bargain and negotiate fair terms and conditions.

Technology and Data Protection:

The role of technology and data protection in platform work was discussed, emphasizing the need for regulations to safeguard platform workers' privacy and protect their data from exploitation.

Social Safety Nets and Support:

The importance of establishing social safety nets and support mechanisms for platform workers was discussed, including portable benefits, access to healthcare, retirement plans, and income security.

Stakeholder Collaboration:

Participants stressed the significance of collaborative efforts between platform companies, government agencies, labor unions, and civil society organizations.

Continuous Monitoring and Evaluation:

Participants concluded that regular monitoring and evaluation of policy measures and their impact on platform workers are essential.

V. Policy and Regulatory Landscape

A. Existing policies and regulations related to the platform economy in the country

The current policy and regulatory landscape in Bosnia and Herzegovina does not fully address the unique challenges posed by the platform economy. Existing regulations may not adequately protect the rights and well-being of platform workers.

B. Gaps and challenges in the current regulatory framework

The lack of a legally binding definition of online platforms and unclear worker classification criteria contribute to regulatory gaps in platform work. This results in issues such as tax obligations and social protection gaps.

C. International best practices and policy approaches (EU Directive)

Best practices and policy approaches from other countries, including the EU Directive on transparent and predictable working conditions, could serve as valuable references for shaping regulations in Bosnia and Herzegovina.

VI. Policy Recommendations

A. Enhancing worker protection and rights

Policy measures should focus on enhancing worker protections and ensuring fair working conditions for platform workers. This includes providing access to social safety nets, healthcare, and pension benefits.

B. Strengthening Collaboration and Dialogue Among Stakeholders

Collaboration between platform companies, government agencies, labor unions, and civil society organizations is essential for creating effective policies and addressing the concerns of all stakeholders involved.

VII. Implementation and Monitoring

A. Strategies for implementing the recommended policies

Implementing the recommended policies will require a multi-pronged approach, including legislative changes, collaboration among stakeholders, and public awareness campaigns.

B. Roles and responsibilities of relevant stakeholders

Various stakeholders, including government authorities, platform companies, worker associations, and advocacy groups, have distinct roles to play in implementing and enforcing the policies.

C. Mechanisms for monitoring and evaluating policy effectiveness

Regular monitoring and evaluation of policy

measures are essential to assess their impact and make necessary adjustments to ensure their effectiveness.

VIII. Conclusion

A. Summary of key findings and recommendations

The research and round table discussions have provided valuable insights into the platform economy in Bosnia and Herzegovina. The report identifies key challenges and opportunities for platform workers and proposes policy recommendations to enhance their well-being and rights.

Platform work has become an increasingly important part of the economy in Southeast Europe, and particularly in Bosnia and Herzegovina. The research conducted on platform workers in this region has identified several key trends and characteristics, which provide crucial context for our understanding of this sector. The dominance of certain platforms, the distribution of work across various fields, the engagement of workers in these platforms, and the impact on the gender dynamics within the workforce are all notable findings that provide insight into the current state of platform work.

Moreover, the subjective well-being of these workers, as revealed in the research, has highlighted some of the unique challenges and opportunities inherent in platform work. This includes the impact of remote work on freelancers' personal lives and health, as well

as the fulfilment of their economic and professional expectations. These findings underscore the importance of understanding and addressing the various factors that influence the well-being of platform workers.

The roundtable discussion with multiple stakeholders further illuminated the complex issues surrounding the position of platform workers. The need for a comprehensive legal framework, accurate worker classification, collective bargaining, technology and data protection, social safety nets, stakeholder collaboration, and continuous monitoring and evaluation was collectively agreed upon as key areas for improvement. These recommendations provide a roadmap for future policy development and intervention aimed at enhancing the rights and well-being of platform workers.

In conclusion, both the research into platform work and the multi-stakeholder discussion underscore the importance of a comprehensive and nuanced approach to understanding and addressing the challenges faced by platform workers in Bosnia and Herzegovina. The insights gained from both these efforts should serve as a valuable guide for policymakers, platform companies, and other stakeholders as they work towards creating a more inclusive, equitable, and supportive environment for platform workers. The future of work is increasingly digital and flexible, and it is essential that we continue to adapt our policies and practices to reflect these changes, ensuring that all workers can benefit from the opportunities this new landscape provides.

B. Implications for the future of the platform economy in Bosnia and Herzegovina

The successful implementation of the proposed policies will shape the future of the platform economy in Bosnia and Herzegovina, fostering an environment where platform work can thrive while ensuring the protection and rights of workers.

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