



GIGMETAR REGION NEWSLETTER #2

SPRING 2024

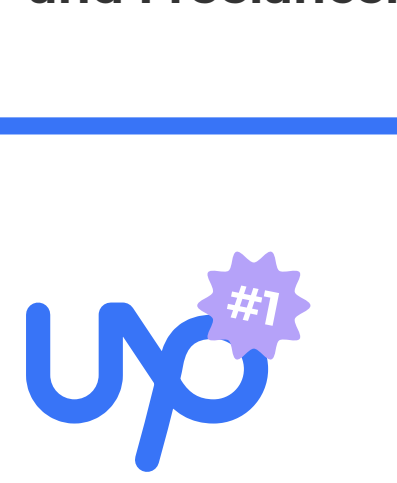
Latest news, employers' ratings, changes to the digital labour market over the years

Gigmetar is the first instrument that charts the digital geography of South-Eastern Europe in terms of the genders, incomes, and most common occupations of digital workers. Its **methodology**, based on big data processing and in-house software, is designed to promote accuracy.

1

Fast-paced changes in an evolving digital labour market: Latest finding

OCT 2023 - APR 2024



The population of gig-workers **contracted** across all three major platforms (**Upwork, Guru and Freelancer**) by **7.6%**

Albania, Bosnia and Herzegovina, Hungary, Romania and North Macedonia saw an average drop of **11.2%**.

Serbia, Croatia, and Montenegro experienced a moderate **increase**, with an average growth of **1.3%**.

Upwork remained the most popular gig worker platform seeing an **increase in its market share** to more than **60%**.

Writing and translation contracted the **most** across the region, with a fall of **12.8%**.

The **greatest growth rate of any single occupation** was recorded in **Serbia** – For every 100 registered gig-workers, **37** of them were working.

New entrants seemed to face the greatest challenges, **as they accounted for no more than 22%** of the workforce active at the time of the measurement.

New entrants to the gig work market tended to choose **sales and marketing support**, with this occupation registering regional growth of **7.5%**.

As male gig workers have continued to decline, the **share of women** in the freelancer population has **kept growing to a historic high of 38.3%**.

2

Global positioning of European gig workers: Employers' perspective in April 2024

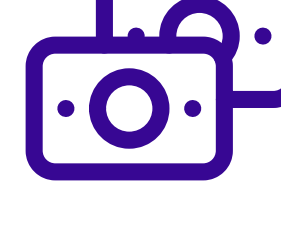
A total of **7.7%** of South-Eastern European freelancers were recognised by global employers as **'talents'**, regardless of whether they had a strong footprint in platform work or were at the early stages of their careers



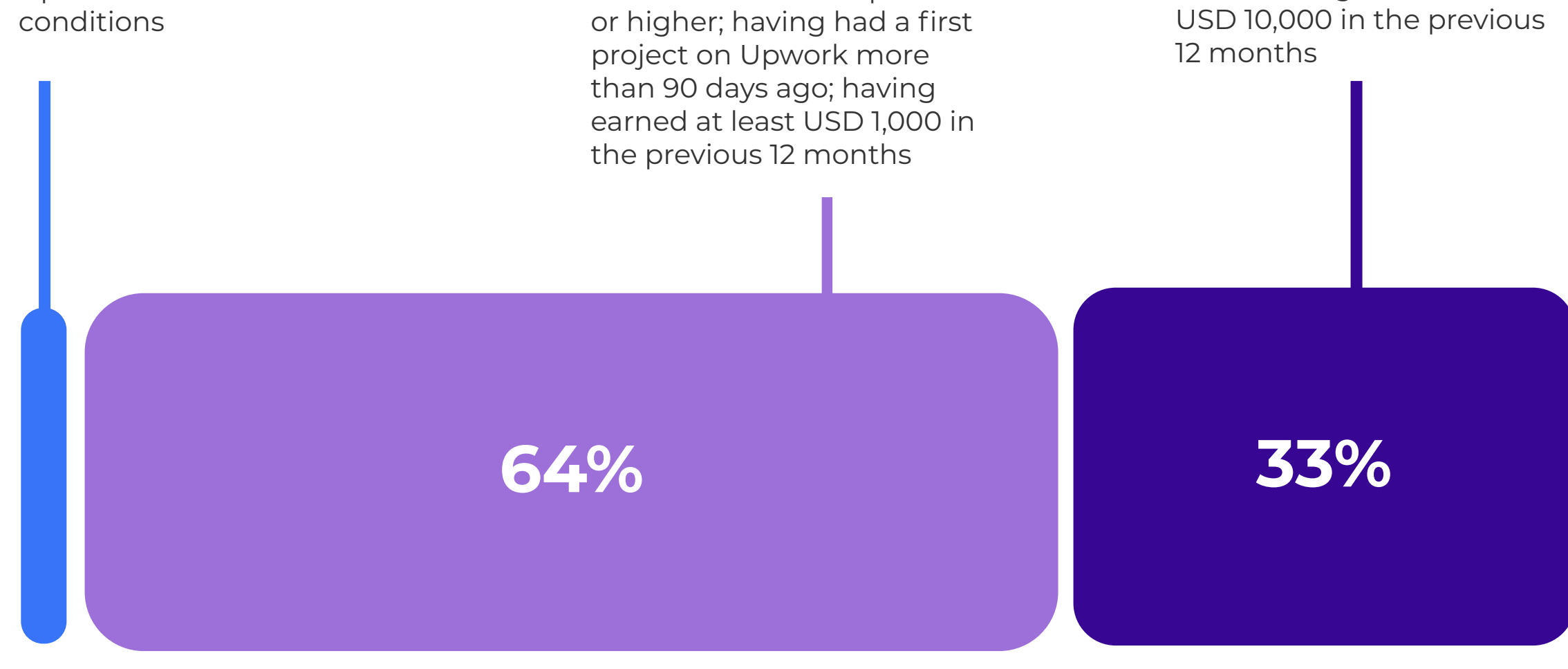
Rising talent requires a 100 percent complete profile following Upwork's terms and conditions



Top rated requires, in addition to Rising talent criteria, a Job Success Score of 90 percent or higher; having had a first project on Upwork more than 90 days ago; having earned at least USD 1,000 in the previous 12 months



Top rated plus has the same requirements as Top rated, except that total earnings must be over USD 10,000 in the previous 12 months

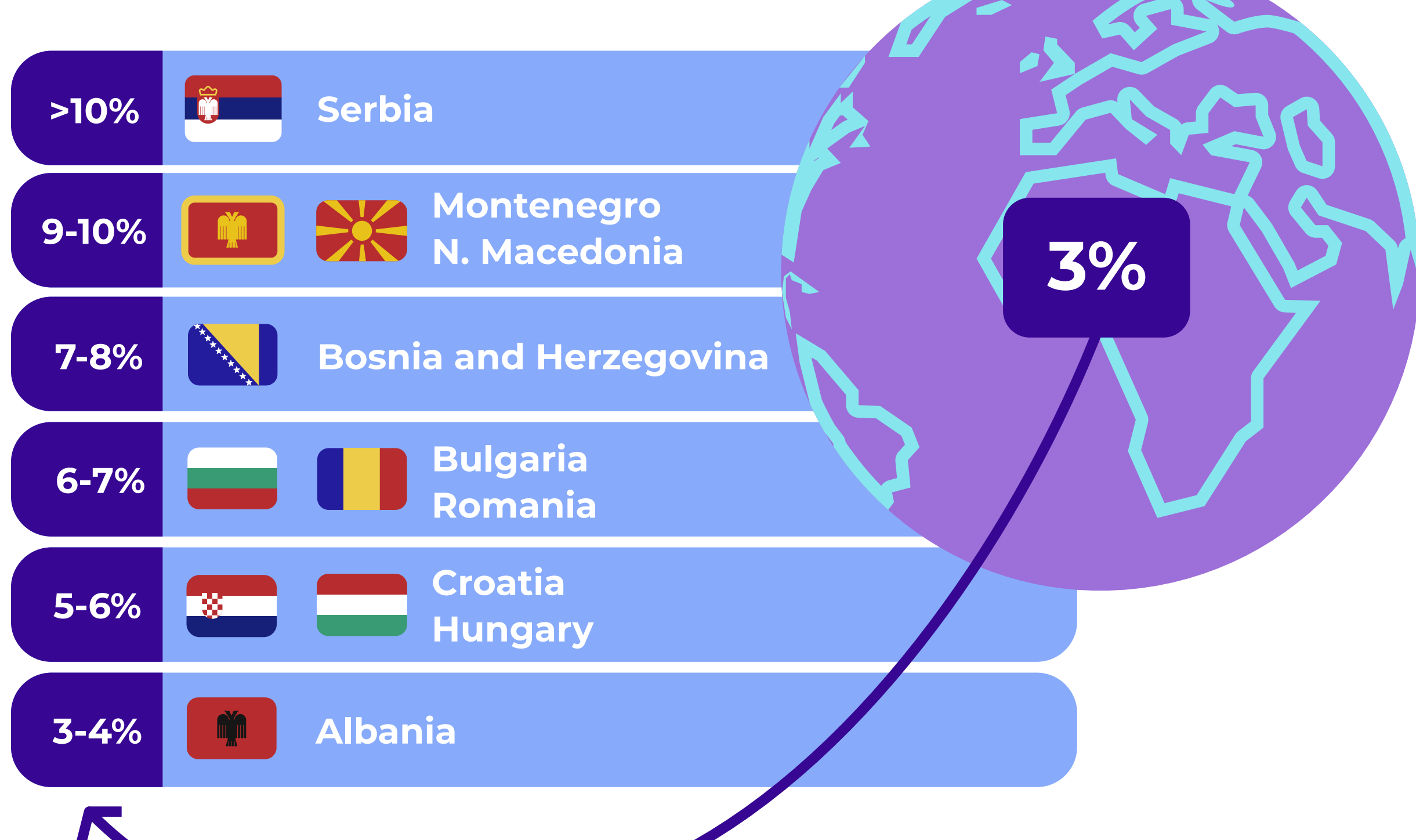


Share of talents by category

The talent pool is dominated by Top rated freelancers

64,2%

All countries had shares of top rated gig workers above the **global average** (3% of the total global population), although the shares of these talents in the total population varied greatly by country:

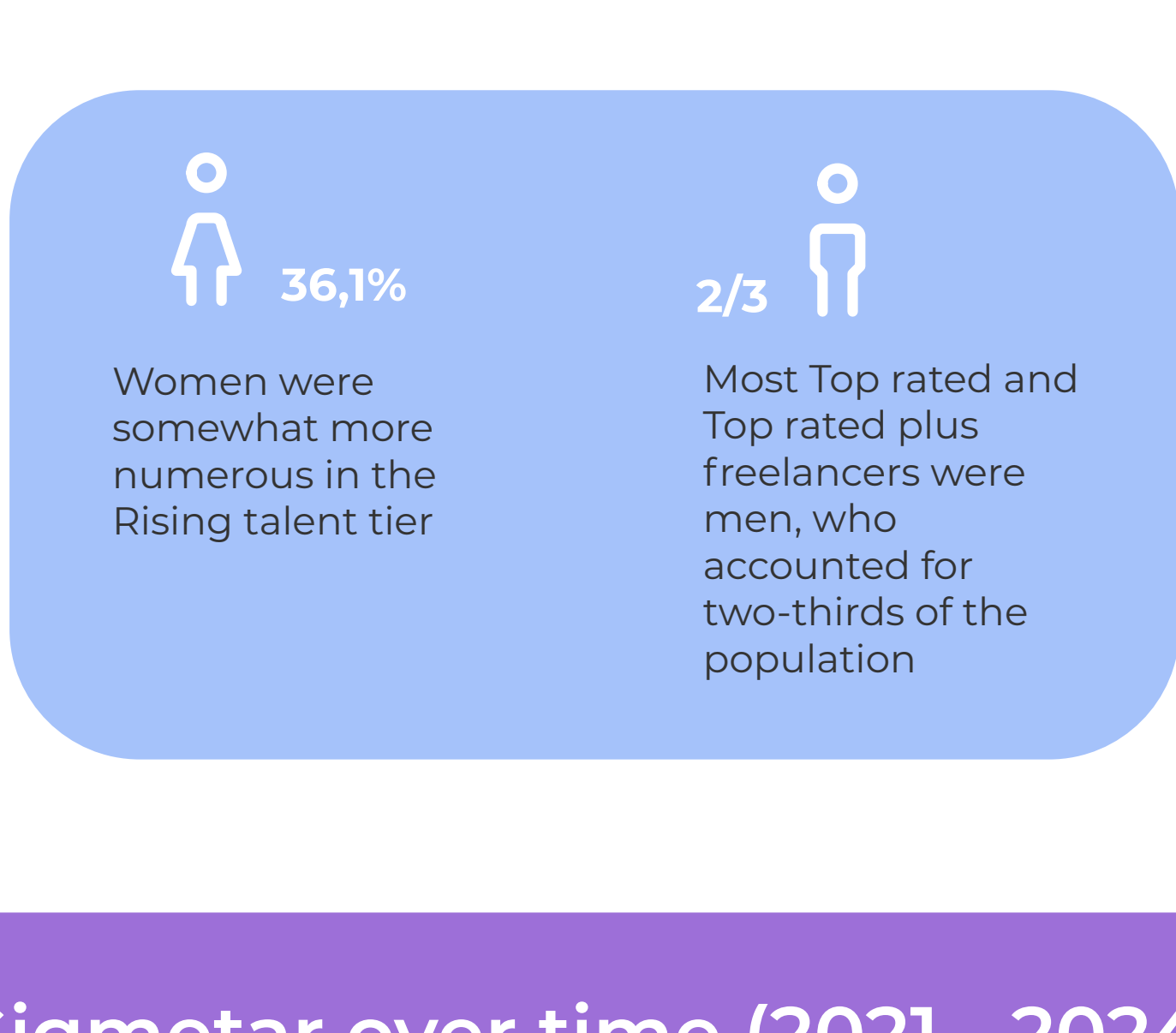


The best rated freelancers (those in the Top rated and Top rated plus tiers) have had on average

65 GIGS

Higher tiers commanded premiums: Top rated plus gig workers asked for rates on average 30.7% higher than their Top rated peers, who in turn commanded rates higher by 37.3% than Rising talent

Rising talent (+37,3%) Top rated (+30,7%) Top rated plus



3

Gigmetar over time (2021 - 2024): Vibrant growth and a soft landing

On Upwork, the most common platform, the regional gig worker population rose by 50.4 percent, although the pace varied by country

Croatia and Serbia saw the greatest growth:

The slowest growth was registered in Bulgaria and Albania

Croatia: 92.7%

Bulgaria: 28.4%

Serbia: 99.3%

Albania: 38.6%

Growth was seen across all occupations

Professional services registered the highest growth: **158,6%**

Creative and multimedia saw the smallest increase: **22,7%**

Software dev and tech saw the largest proportion of new entrants: **5,385**

Growth was unequal across genders, with the women freelancer population expanding more quickly

Women: **68,6%** Men: **42,9%**

The gender gap narrowed over the past three years

The share of women gig workers in the overall population rose from **34,4% to 38,3%**.

The gap in the hourly rate was contracted: in April 2021, female gig workers commanded 81,2% of the average hourly rate, in **April 2024 this rose to 87%**.

Hourly rates in US\$ rose modestly on average



The increase in hourly rates in US\$ was not equal across regions, countries, and occupations:

Hourly rates in regional EU member states rose far more slowly than in Western Balkan countries, at **8.6% vs 77,9%** in 2021 and **18.6% vs 85,1%** in 2024.

Montenegro registered the greatest increase in hourly rates, whilst Croatian freelancers saw the lowest growth: **27,8%** vs **2,4%**

Hourly rates by occupation rose on average by more than 10 percent, with **writing and translation** seeing the greatest increase at **22,8%** and **professional services** recording the lowest growth at **10,7%**. **22,2%** and **9,5%**

Women gig workers in South-Eastern Europe are the undisputed champions of changes:

Not only has their number increased, but their hourly rates have also grown faster than for their male peers.



Autori Andjelkovic, B., Jakobi, T., Ivanovic, V., Kalinic, Z. & Radonjic, Lj. (2024.) Gigmetar Srbija. Njuzleter Prolece 2024, 2(1). <https://gigmetar.publicpolicy.rs/njuzleter/>

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