

BACKGROUND PAPER

Mapping platform work in *Serbia*

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EUROPEUM Institute for European Policy is a non-profit, non-partisan, and independent think-tank focusing on European integration and cohesion. EUROPEUM contributes to democracy, security, stability, freedom, and solidarity across Europe as well as to active engagement of the Czech Republic in the European Union. EUROPEUM undertakes original research, organizes public events and educational activities, and formulates new ideas and recommendations to improve European and Czech policy making.

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About the project

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1. Characteristics of platform work in Serbia

1.1. Features of platform work in Serbia

Online platform work in Serbia is primarily geared toward the international market and is most prevalent in the IT and creative industries. Online platform workers are distributed as follows: creative services and multimedia (36%), software development (28%), administrative services and data entry (11%), writing and translation (11%), sales and marketing (8%), and professional services (6%).¹ On-site platform work is concentrated on transportation, food and goods delivery.

Freelancers in Serbia rely on international and domestic platforms (Upwork, Freelancer, Guru, Contra, Fiverr, and PeoplePerHour). For on-site services, a mix of global and local platforms is used (Glovo and Wolt—food delivery, CarGo—transportation, Daibau²—construction, and Uradi Zaradi—domestic work).

1.2. Prevalence of platform work

While the exact number of platform workers is difficult to determine, estimates suggest that they represent roughly 0.5-1% of the total employed population or 14,500 to 29,000 platform workers.³ One-third of platform workers rely solely on online work, while 54% also hold offline jobs.⁴ However, two-thirds are employed

¹ Public Policy Research Center. (2024). Gigmetar Serbia October 2024. Retrieved from: <https://gigmetar.publicpolicy.rs/srbija-2024-2/>.

² Daibau is an international online platform that connects clients with professionals in the construction and renovation industry. Daibau operates in several European countries, including Slovenia, Austria, Croatia, Serbia, Bosnia, Romania, and Slovakia.

³ There are no official statistics on the number or share of platform workers in Serbia. The available figures are estimates from different sources. Serbia has consistently ranked first globally in terms of the percentage of digital workforce relative to the country's population and total workforce. The *Gigmetar Report* (2024) estimates that the number of gig workers in Serbia is 226.8 per 100,000 people, which translates to approximately 0.5% of the total employed population (excluding on-site platform workers). Additionally, AnalyticsHelp (2018) estimates the number of platform workers at 24,605, or approximately 0.7% of total employment in Serbia. The estimate includes both, online and on-site workers. Aleksynska, M. (2021). "Platform work and online jobs: A literature review." International Labour Organization (ILO). Retrieved from: https://www.ilo.org/sites/default/files/wcmsp5/groups/public/%40dgreports/%40inst/documents/publication/wcms_794543.pdf.

⁴ Aleksynska, M. (2021). "Platform work and online jobs: A literature review." International Labour Organization (ILO). Retrieved from:

informally through the platforms. Women now make up only 33.1% of the platform workforce, while men comprise 66.9%.⁵⁶ Delivery workers on platforms often have a migrant background, with many coming from Uzbekistan, Kyrgyzstan, Cuba, and recently, Turkey.⁷ Online platform workers are mostly Serbians. However, the presence of Russian IT professionals in Serbia has increased since 2022. Platform workers involved in transportation tend to be middle-aged men with relatively long work experience and secondary or higher education.⁸ Education levels among remote platform workers are high, with the majority holding university degrees.⁹

1.3. Growth of platform work

In previous years, Serbia's platform work consistently grew. However, in 2024, Serbia's platform economy experienced notable shifts. Between April and October 2024, the number of freelancers active on Upwork decreased by 16.2%.¹⁰ The decline in platform work can be attributed to several key factors. On the demand side, the increasing use of AI tools has reduced the need for certain services. On the supply side, however, the high growth seen in previous years had to slow down. Additionally, lower unemployment rates and a growing number of job opportunities have led many platform workers to shift toward traditional employment. However, while online freelancing has seen a decline, on-site platform work has recorded positive trends. Despite the reduction in the

https://www.ilo.org/sites/default/files/wcmsp5/groups/public/%40dgreports/%40inst/documents/publication/wcms_794543.pdf.

⁵ Men continue to dominate higher-paying sectors like IT and software development, while women are more represented in creative services and administrative support. Additionally, men dominate the on-site platform workforce.

⁶ Public Policy Research Center. (2024). Gigmetar Serbia 2024. Retrieved from <https://gigmetar.publicpolicy.rs/srbija-2024-2/>.

⁷ Infostud. (2024, March 19). "Dostavljača nikad dosta – čak ih i uvozimo, a plata oko 1.500 evra." Retrieved from https://poslovi.infostud.com/blog/dostavljacka-nikad-dosta-cak-ih-i-uvozimo-a-plata-oko-1-500-evra/?utm_source=vesti-2024-03-19&utm_medium=email&utm_campaign=vesti-o-zaposljavanju.

⁸ Friedrich-Ebert-Stiftung. (2023). Online platforms and platform work: Serbia. FES Competence Centre on the Future of Work. Retrieved from <https://library.fes.de/pdf-files/bueros/bruessel/20774.pdf>.

⁹ Aleksynska, M. (2021). "Platform work and online jobs: A literature review." International Labour Organization (ILO).

¹⁰ This decline was more pronounced in occupations such as clerical work and data entry, sales and marketing support, and professional services, which saw reductions ranging from 25% to 36%. In contrast, fields like software development and tech, as well as creative and multimedia, experienced a smaller decrease (of 5.2%).

freelancer population, average hourly rates increased by 5.9% from April to October 2024, reaching approximately 21.75 EUR.

2. Driving factors

In the past decades, Serbia's unemployment rate was much higher,¹¹ which increased engagement in platform employment. As of the second quarter of 2024, Serbia's unemployment rate decreased to 8.2%, a record low since Q2 2020.¹² This decline lowered the demand for platform-based work.

The disparity between gross and net salaries,¹³ along with relatively lower wages in traditional sectors, once drove many individuals to platform work. The increase in average salaries and adjustments in taxation reduced the economic drive for engaging in platform work. However, platform work still offers flexibility and higher earnings potential in certain sectors, such as IT.

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Serbia's GDP expanded by 3.8% in 2024.¹⁴ As Serbia's economy grows and disposable income rises, more people can afford convenience services, including

ordering food, which increases demand for on-site platform workers.

Besides flexibility, the growth of platform work in Serbia can be attributed to structural challenges in accessing formal entrepreneurship¹⁵ that encourage

¹¹ The peak was reached in 2012, following the global financial crisis when the unemployment rate stood at 25%.

¹² World Bank. (2021). "Macro Poverty Outlook: Serbia – Spring 2021." Retrieved from <https://thedocs.worldbank.org/en/doc/d5f32ef28464d01f195827b7e020a3e8-0500022021/related/mpo-srb.pdf>.

¹³ In November 2024, the average gross salary in Serbia was 138,911 RSD, with the average net salary at 100,738 RSD (around 850 EUR). Statistical Office of the Republic of Serbia. (2024). "Wages and Salaries." Retrieved from <https://www.stat.gov.rs/en-US/oblasti/trziste-rada/zarade>.

¹⁴ World Bank. (2021). "Macro Poverty Outlook: Serbia – Spring 2021." Retrieved from <https://thedocs.worldbank.org/en/doc/d5f32ef28464d01f195827b7e020a3e8-0500022021/related/mpo-srb.pdf>

¹⁵ Limited access to formal entrepreneurship in Serbia can be attributed to a range of bureaucratic obstacles, such as complex registration processes, excessive paperwork, and slow administrative procedures, which often

workers to seek income through platforms. This trend is amplified by the digital transformation and the increasing demand for task-based work.

3. Country-specific impact: benefits and challenges

For workers, the main benefit is flexibility, as platform work provides a better work-life balance, particularly for students, retirees, or individuals with family responsibilities. In addition to flexibility, platform work provides access to the global labor market.

Platform work contributes positively to job creation and GDP growth. The economy benefits from increased income generation and consumption, which stimulates investment. Furthermore, the expansion of the digital economy in Serbia fosters growth and innovation.¹⁶

On the other hand, platform work often comes at the cost of job security. Platform workers in Serbia face uncertain income, as many of these jobs are project-based and depend on fluctuating demand. Platform work in Serbia is also deeply embedded in the informal economy.

Two-thirds of online workers are in hidden employment, with 19% unemployed, 27% inactive, 23% holding another offline job, and 31% self-employed.¹⁷ Regarding rights and benefits, 20%

have no access to any social protections, while 26% have health insurance but lack retirement and unemployment coverage. Furthermore, the lack of regulation

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discourage individuals from pursuing official business ventures. Additionally, there is a significant lack of financial support, including insufficient access to startup capital, loans, or grants, particularly for smaller businesses or those without established networks.

¹⁶ European Commission. (2024). Serbia 2024 Report. European Commission.

¹⁷ Friedrich-Ebert-Stiftung. (2022). "Embracing the Digital Age: The Future of Work in the Western Balkans; New Forms of Employment and Platform Work" Retrieved from <https://www.etf.europa.eu/sites/default/files/2022-07/Embracing%20the%20digital%20age.pdf>.

and oversight in the platform economy in Serbia contributes to various social problems. For instance, workers often face exploitative practices.¹⁸

4. Current national regulatory landscape and EU criteria

4.1. Classification of platform work

In Serbia, platform work is not explicitly defined in the Law on Labor, leading to challenges in classifying and regulating it within the existing legal framework. The Law on Labor does not include a provision directly addressing the work carried out via online platforms. The Regulation on the Classification of Activities does not explicitly recognize platform work as a distinct category, meaning that workers and platform companies must rely on existing classifications. Depending on the type of service provided, platform work may fall under different categories.

The classification of platform workers as either self-employed or employees remains a gray area. For the most part, platform workers are classified as self-employed under Serbian law, as they are typically engaged in independent contracting via platforms. This classification does not provide them with the full spectrum of rights available to employees under Serbian law. Economic dependence on a platform may place some platform workers in a status similar to that of employees, even though they are legally considered freelancers.

For self-employed platform workers, Serbia's social security system includes mandatory contributions for health insurance, pension, and disability insurance. However, platform workers often face issues related to their eligibility for social security, especially when their income is irregular. In 2021, new amendments to

¹⁸ Workers engaged through digital platforms, particularly food and goods delivery couriers, often face exploitative practices. They typically work between 12 and 15 hours a day without basic employment benefits. Many are hired through intermediary agencies, to which they must give a portion of their monthly earnings, while the contracts they sign fail to guarantee basic labor rights. See more: https://novaekonomija.rs/vesti-iz-zemlje/trka-za-izazovima-zarade-dostavljacka-zavisi-i-od-algoritma#google_vignette.

tax legislation¹⁹ were introduced, allowing self-employed (including platform workers) to choose between two tax models based on their income levels.²⁰ These amendments also introduced some level of social security protection. However, access to other social security benefits remains uneven and often insufficient.

Unlike employees, platform workers do not have access to unemployment benefits. Under the current legal framework,²¹ only employees, entrepreneurs, and officially recognized freelance artists have access to such rights. This legal gap leaves a large portion of platform workers without protection that would otherwise be available to standard employees.²²

As of January 2025, there have been no widely reported court cases in Serbia specifically addressing the legal status or rights of platform workers. The legal framework concerning platform work in Serbia remains underdeveloped. A 2019 study highlighted that approximately two-thirds of platform workers in Serbia performed undeclared work and were not registered with the Central Register of Mandatory Social Insurance.²³

¹⁹ The law that was amended in 2021 to introduce changes for freelancers, including platform workers, is the Law on Personal Income Tax (Zakon o porezu na dohodak građana) in Serbia.

²⁰ According to the first model, a fixed amount of €820 per quarter is tax-exempt. If opting for this model, the tax rate is 20%. Therefore, any amount exceeding €820 per quarter will be taxed at this rate. On the other hand, if an individual earns less than €820 in a quarter, they are exempt from paying pension, disability, and health insurance contributions for that quarter. The second model includes a tax-exempt portion consisting of a fixed amount—€165 per month (€495 per quarter)—and a 34% deduction on total quarterly income, with an income tax rate of 10%. To determine the taxable base, 34% of the income should first be deducted, followed by an additional €495 per quarter. The second model may be more optimal for individuals with higher earnings. (Conversions are based on an exchange rate of approximately 117 RSD = 1 EUR, rounded for simplicity.) Law on Personal Income Tax (Zakon o porezu na dohodak građana), Official Gazette of the Republic of Serbia, no. 24/2001, 80/2002, 80/2003, 135/2004, 62/2006, 65/2009, 46/2011, 93/2012, 108/2013, 14/2015, 68/2015, 40/2016, 99/2017, 86/2019.

²¹ Law on Health Insurance (Zakon o zdravstvenom osiguranju), Official Gazette of the Republic of Serbia, no. 107/2005, 109/2005, 57/2011, 110/2012, 119/2014, 123/2014, 106/2015, 113/2017, 95/2018, 10/2020, 86/2020.

²² Urdarević, B. (2022), *Frilenseri i problemi u njihovom pojmovnom definisanju*, Beograd, Centar za istraživanje javnih politika. Retrieved from:

<https://publicpolicy.rs/publikacije/6ad539ce9acc26df8cab8c8854fd08230b7b9f08.pdf>.

²³ European Commission. (2019). Study to gather evidence on the working conditions of platform workers. Directorate-General for Employment, Social Affairs and Inclusion. Retrieved from:

<https://op.europa.eu/en/publication-detail/-/publication/a698537c-6e49-11ea-b735-01aa75ed71a1/language-en>.

4.2. Union representation for platform workers

Union representation for platform workers in Serbia faces significant challenges due to the lack of legal recognition of their employment status and their classification as self-employed rather than employees. This legal gap prevents them from enjoying crucial labor rights. Consequently, platform workers are often left vulnerable to exploitation. This exclusion from traditional unions has led to the rise of independent initiatives specifically targeting platform workers.²⁴ However, they lack the same level of power as established unions. Additionally, trade unions have recognized the need to protect the rights of these workers and are developing strategies to include them in union activities.²⁵

4.3. Current policy debates

There is a growing argument for introducing a legal category for “economically dependent self-employed” workers.²⁶ This would help in ensuring better protection for platform workers, particularly in terms of labor rights and social security. However, some policymakers worry that this could be misused to undermine the traditional workforce by shifting employees into cheaper, more precarious labor conditions.²⁷

Another significant discussion revolves around defining platform work within Serbia’s legal framework. Advocates for change are calling for the introduction of

²⁴ The most notable one is the Internet Workers’ Association (*Udruženje radnika na internetu*).

²⁵ Additionally, at a recent roundtable organized by Union of Autonomous Trade Unions “Nezavisnost” (Unija glavnih sindikata „Nezavisnost”) and the Confederation of Autonomous Trade Unions of Serbia (Savez samostalnih sindikata Srbije), strategies for organizing and protecting the labor rights of platform workers in Serbia were presented. The discussion focused on the possibility of amending the Law on Labor to expand the application of labor regulations to all workers, including those employed through digital platforms. The proposed changes would enable trade unions to expand their membership and encompass a broader group of workers, including platform workers. See more: <https://www.masina.rs/eng/trade-unions-present-strategies-for-improving-the-position-of-platform-workers-in-serbia/>.

²⁶ Urdarević, B. (2022), *Frilenseri i problemi u njihovom pojmovnom definisanju*, Beograd, Centar za istraživanje javnih politika. Retrieved from:

<https://publicpolicy.rs/publikacije/6ad539ce9acc26df8cab8c8854fd08230b7b9f08.pdf>.

²⁷ Savez samostalnih sindikata Srbije. (2024). *O položaju radnika na digitalnim platformama u Srbiji*. Retrieved from: <https://publicpolicy.rs/publikacije/48eb7af417cd518b79445c59bbfa4f59a6ba1c91.pdf>.

clearer rules, the establishment of minimum labor standards, and better dispute-resolution mechanisms.²⁸

4.4. EU level

In the context of EU accession, the most relevant chapters include Chapter 19 (Social Policy and Employment) and Chapter 2 (Free Movement of Workers). In line with Chapter 2 of the EC Progress Report, Serbia is encouraged to improve the alignment of its labor market policies with EU standards, particularly regarding the mobility of workers. While the report does not directly address platform work, the broader recommendations to streamline employment processes and strengthen social security coordination are pertinent. Regarding Chapter 19, Serbia's social policy and employment measures should also reflect EU directives, including those impacting workers in non-standard employment, such as platform workers. Recommendations focus on enhancing the coverage of social benefits, addressing employment policy gaps, and ensuring that policies target vulnerable groups.²⁹

²⁸ Urdarević, B. (2022), *Frilenseri i problemi u njihovom pojmovnom definisanju*, Beograd, Centar za istraživanje javnih politika. Retrieved from: <https://publicpolicy.rs/publikacije/6ad539ce9acc26df8cab8c8854fd08230b7b9f08.pdf>.

²⁹ European Commission. (2024). [Serbia 2024 Report](#).

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Public Policy Research Center. 2024. *Gigmetar Serbia October 2024*. Retrieved from: <https://gigmetar.publicpolicy.rs/srbija-2024-2/>.

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World Bank. 2021. "Macro Poverty Outlook: Serbia – Spring 2021." Retrieved from: <https://thedocs.worldbank.org/en/doc/d5f32ef28464d01f195827b7e020a3e8-0500022021/related/mpo-srb.pdf>.

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