



GIGMETAR REGION NEWSLETTER #4

SPRING 2025

Latest news, gig workers' preferences for long-term employment, and evolution of the digital market over time

Gigmetar is the first instrument created to track digital work trends in Serbia and South-Eastern Europe by gender structure, earnings and occupations on the online labour market. A **methodology** based on big data processing of publicly available information using in-house software, was developed to explore the features of digital workers.

1

Digital labour market faces uncertainty: latest findings

OCT 2024 - MAY 2025

Stagnating gig labour supply. This latest fourth consecutive fall in the overall gig workforce has been relatively minor (at 0.7%). Ninety of every 100 workers who left the market had been active in either software dev and tech or creative and multimedia.

Romanian exception. Romania was the sole country in the region to register gig worker growth across all platforms, from 0.5% on Guru to 4.8% on Freelancer. Albania and North Macedonia have lost the largest percentages of freelancers in this survey.

Contraction in Upwork's market share. Although Upwork accounts for 55.6% of the regional labour market on the top three platforms, it has lost some of its lead. Serbia, Upwork's largest market, has remained home to 25.6% of the regional gig workforce on this platform.

Hourly rates continue to grow, at 2%. Nevertheless, major national differences were found, with **North Macedonia and Bulgaria** (at 4.7% and 3.5%, respectively) **registering the largest increase**, whereas **Hungary posted a marginal decline of 0.7%.**

Growing pay gap. The slower growth in women's earnings, which rose by 1.8% vs the 2.2% registered for their male peers, **widened the gender pay gap.** Women are now able to earn 83.1% of men's average hourly rates.

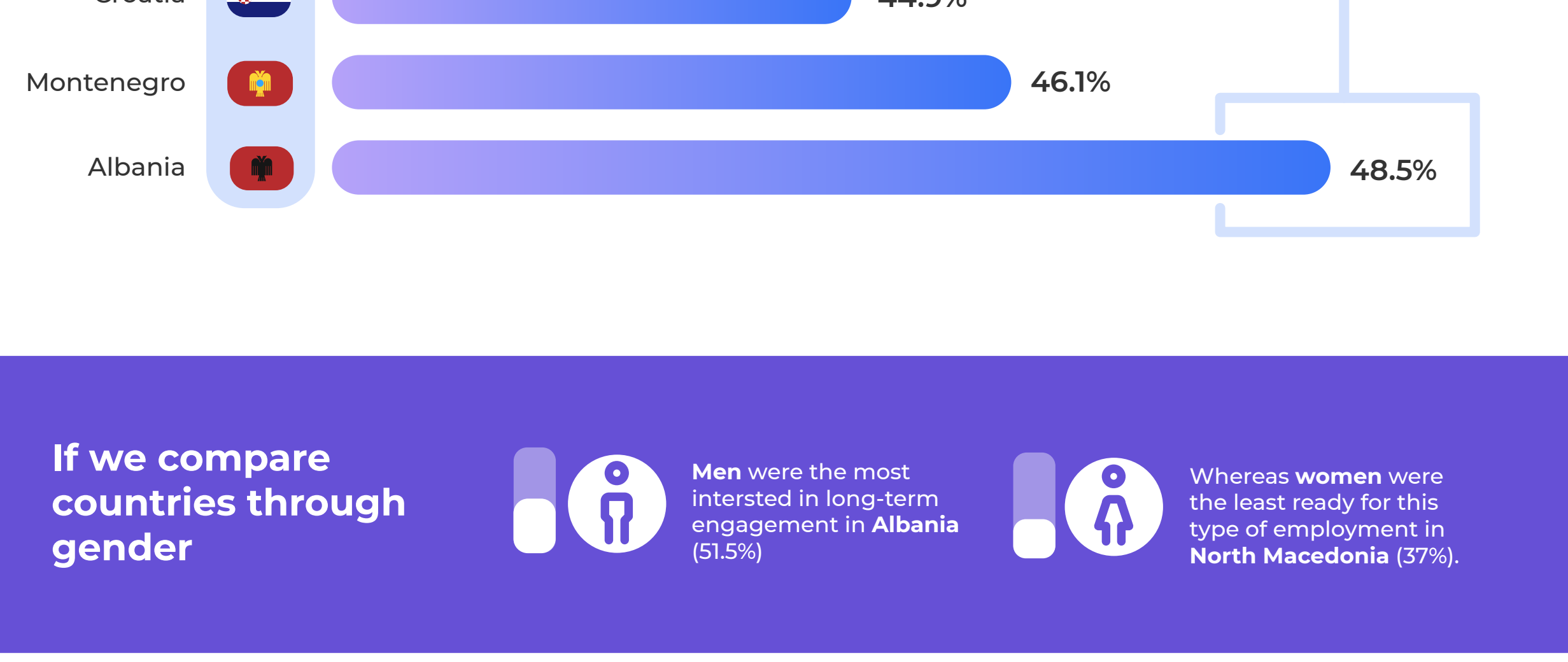
Gig work now less attractive in countries offering greater opportunities in the traditional labour market. For instance, North Macedonia has as many as 7.3 times more freelancers per capita than Hungary, which has recorded the fewest gig workers per 100,000 population.

2

Work outside gigs: Is long-term employment a desirable alternative for gig workers?

Freelancer preferences, May 2025

44.1% of Southeastern European gig workers are open to long-term employment. For a large proportion of the workforce, digital labour markets are clearly venues for seeking engagements that go beyond short-lived gigs. Who are these freelancers?



If we compare countries through gender

- Men were the most interested in long-term engagement in **Albania (51.5%)**
- Whereas **women** were the least ready for this type of employment in **North Macedonia (37%)**.

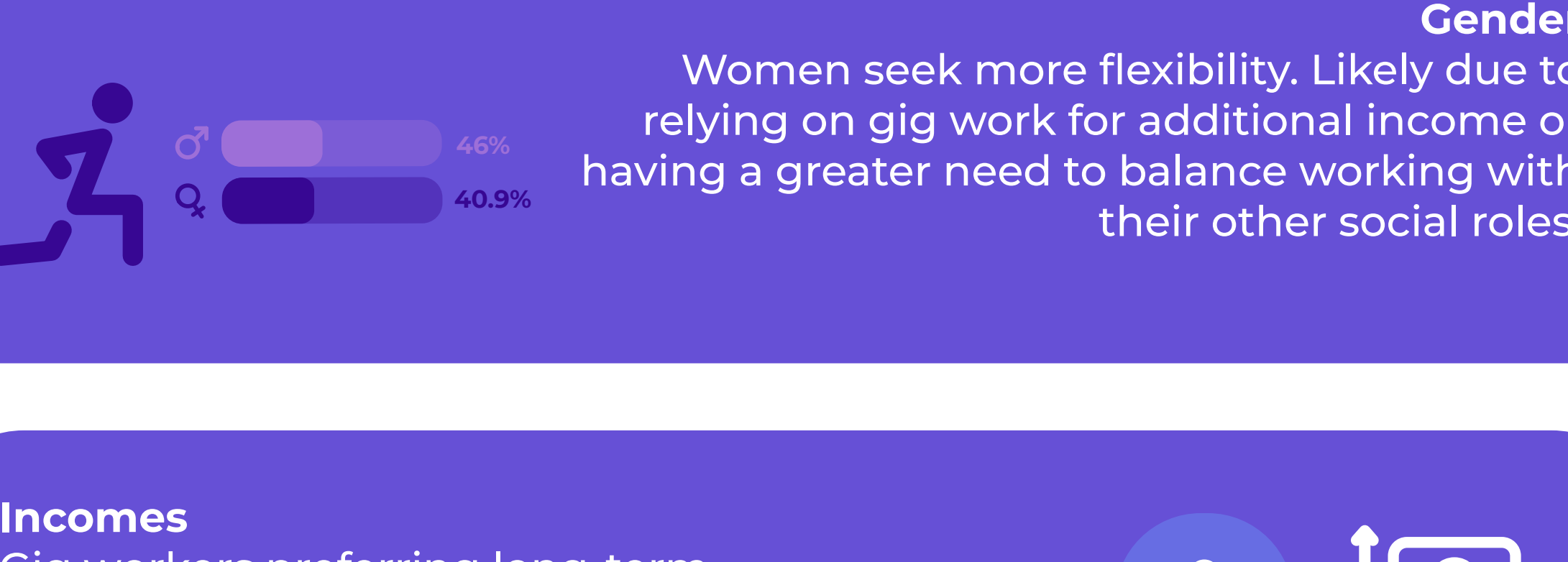
Working experience

Freelancers with more experience are readier to seek long-term employment



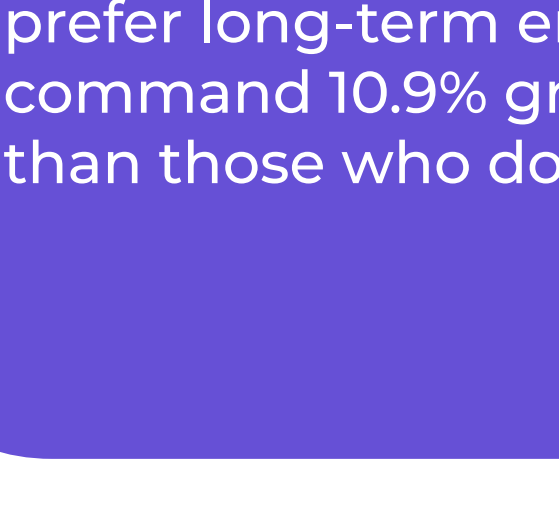
Occupation

Workers in the least sophisticated occupations were the least ready to seek long-term employment. Conversely, occupations with the most advanced gig workers were the readiest to look for firm engagements.



Gender

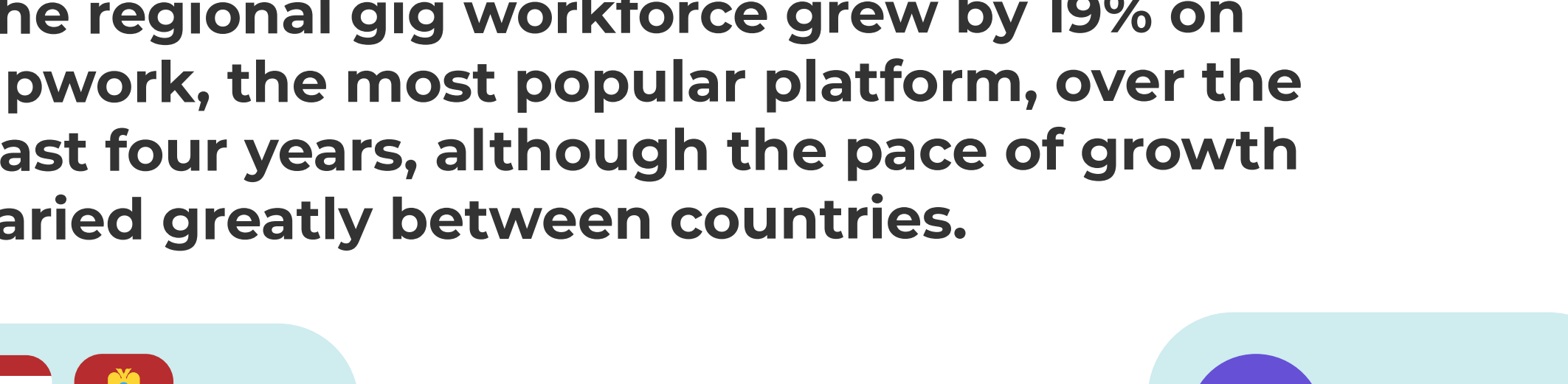
Women seek more flexibility. Likely due to relying on gig work for additional income or having a greater need to balance working with their other social roles.



Incomes

Gig workers preferring long-term employment earn on average 4.9% more.

Men (but not women) freelancers in professional services who prefer long-term employment command 10.9% greater rates than those who do not.



3

Gigmetar over time (2021 - 2025): From fast-paced growth to soft landing

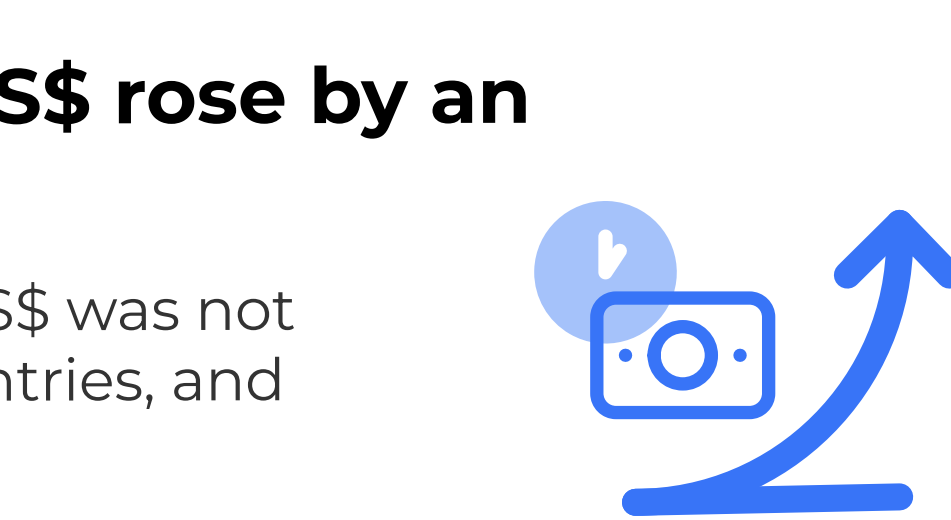
Gig work shares similar features across the region but data for every country tells its own tale.

The regional gig workforce grew by 19% on Upwork, the most popular platform, over the past four years, although the pace of growth varied greatly between countries.



Growth was unequal across genders

The female workforce grew by twice as much



The gender gap contracted over the past four years

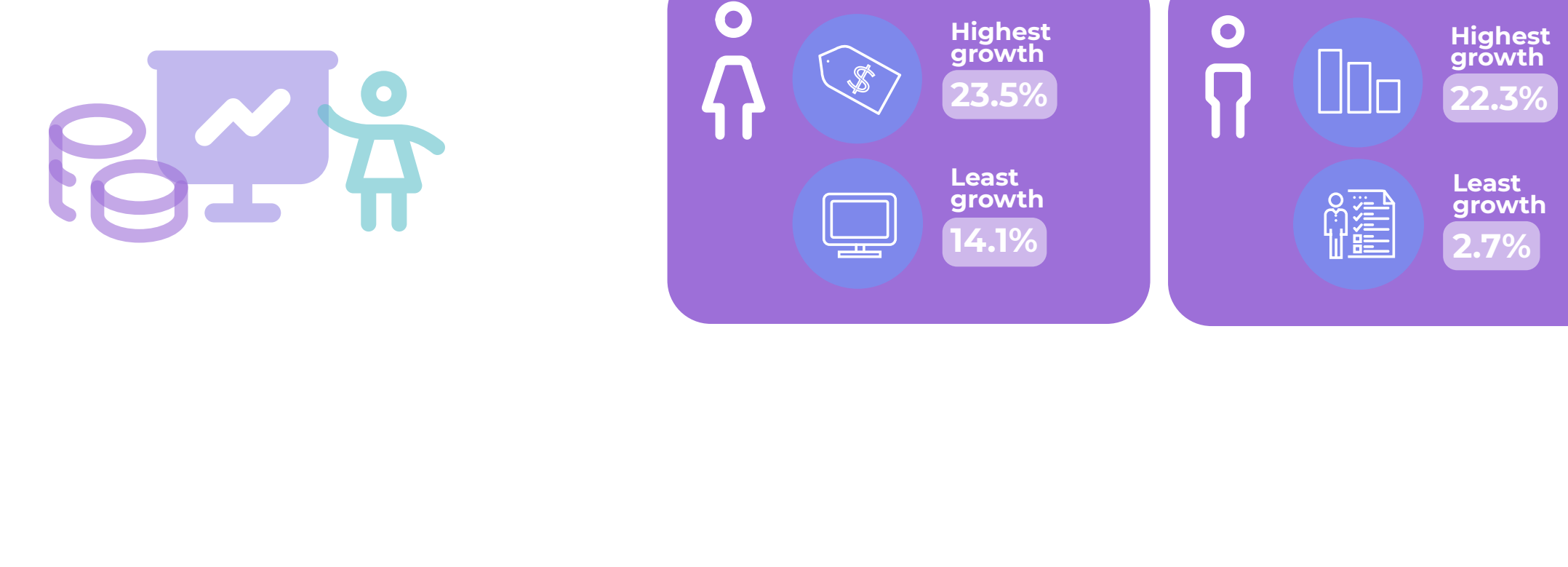


Countries seeing the highest growth by occupation:



Demanded hourly rates in US\$ rose by an average of 20.5%

Growth in demanded hourly rates in US\$ was not distributed equally across regions, countries, and occupations:



Evolution of demanded hourly rates in US\$ by country

April 2021 - April 2025

Country	2025	2021
Montenegro	\$20.68	\$18.66
Bosnia and Herzegovina	\$21.79	\$17.7
Hungary	\$26.78	\$22.54
Montenegro	\$25.98	\$19.95
Croatia	\$27.01	\$24.76
Hungary	\$25.05	\$22.41
Bulgaria	\$26.26	\$22.72
North Macedonia	\$19.18	\$15.79
Montenegro	\$24.42	\$18.44

Women gig workers in Southeastern Europe gained by far the most from changes to the digital labour market

Not only have their numbers increased, but their demanded hourly rates have also grown faster than those of their male peers

Although hourly rates demanded by women increased in one-half of all occupations, growth rates were, on average, higher for women than men

Authors Andjelković, B., Jakobi, T., Ivanović, V., Kalinic, Z. & Radonjic, Lj. (2025.) Gigmetar Srbija. Njuzleter Proleće 2025, 2(1). <https://gigmetar.publicpolicy.rs/njuzleter/>

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