GIGMETAR REGION
NEWSLETTER #6
SUMMER 2026

Latest news, current trends in Serbia, insights from the North Macedonian market, and developments in the digital labour market across Southeast Europe over time.

Gigmetar is the first instrument developed to monitor the geography of digital labour in Southeast Europe, focusing on the gender structure, earnings, and occupational composition of the online labour market. It provides a clear overview of the scale and dynamics of platform-based workers. Gigmetar employs a **methodology** based on the analysis of large-scale publicly available data, supported by the use and continuous development of proprietary software solutions.

1 Digital Labour Market Returns to a Growth Path: Latest Findings

OCT 2025 – MAY 2026

Upwork strengthens its position as the top marketplace of gig workers has increased, alongside a continued growth across other platforms. **Upwork expanded its market share to 17.3%**, maintaining its position as the leading platform. Curo recorded a slight increase, while Freelancer experienced a 19.7% decline.

The regional growth pattern remains uneven, with the recorded figures growth in the number of gig workers, ranging from 0.1% to 14.8% of the region's gig workforce. This confirms the continued shift of gig work from the core of the digital labour market towards the European Union.

Administrative services drive growth, with the strongest growth was recorded in Data Entry and Administrative Services (+14.9%) and Sales and Marketing (+14.6%) in nearly 20%. Together, these two occupational groups **accounted for almost half (48.4%) of all new gig workers** in the region.

Fewer active workers are sharing more work across the workforce. The share of workers actively engaged in at least one project declined to 28.4% (-6.1 p.p.). Serbia and North Macedonia remain the only two with the highest levels of engagement, with around 37% of gig workers active at the time of observation.

Hourly rates continue to rise, with the global average requested hourly rate increased by 4.4%, although growth remained uneven across countries. **Albania recorded the strongest increase,** with an increase of 16.3%.

The gender pay gap is narrowing as women's hourly rates of women gig workers increased faster than those of men (+5.8% vs. +3.7%), reaching 83.3% of men's requested hourly rates. Yet, women still earn less than men across countries. Women **near parity in Albania to Slovenia** with women requested hourly rates for women in Croatia and Hungary.

2 The (Relatively) Largest Regional Market: An Overview of North Macedonia's Gig Labour Market in May 2026

Although only around one in ten gig workers in the region comes from **North Macedonia**, the country has the **highest concentration of gig workers**, with 254 per 100,000 inhabitants across the three largest platforms. This motivated us to take a closer look at the characteristics of this market.

The Supply of Gig Labour is Highly Urbanised.

As many as 93.6% of gig workers are based in 77 cities, while 42% are concentrated in Skopje.

Upwork's Dominance is Stronger Than Anywhere Else in the Region.

66.4% of the country's gig workforce is active on Upwork, compared with the regional average of 58.9%.

The professional structure differs dramatically from the rest of the region.

With an increased share of gig workers in Professional Services, Creative & Multimedia Services, Sales & Marketing, and, especially in Data Entry & Administrative Services.

Occupational Structure:
North Macedonia Compared with Southeast Europe

North Macedonia Is Among the Most Gender-Equal Digital Labour Markets in the Region

The country has a share of women gig workers above the regional average and considerably higher than in the least gender-equal markets in the region, such as Bosnia and Herzegovina.

At the Same Time, It Records the Lowest Hourly Rates in the Region

North Macedonia is the only country with an average requested hourly rate below USD 20. Its average rate is 21.3% lower than the regional average and nearly one-third lower than that of gig workers in Croatia, who continued the highest requested hourly rates in the region.

Despite Lower Average Requested Hourly Rates, the Gender Gap is Among the Smallest in the Region.

Women Gig Workers Requested 87.8% of Men's Hourly Rates (compared with the regional average of 83.3%). In Writing & Translation and Data Entry & Administrative Services, women even commanded higher requested hourly rate than men.

North Macedonian Gig Workers Are Among the Most Active in the Region.

37%

37% were actively engaged at the time of observation, compared with the regional average of 28.4%.

19.5%

They possess a highly diversified skill set. Only 19.5% of gig workers offer skills in a single occupational field, while the remaining 80.5% combine skills and expertise from multiple professional fields.

93%

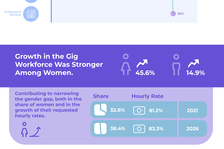
Gig Work as a Career Choice. As many as 93% of gig workers are willing to work more than 30 hours per week on online platforms. Moreover, nearly half (42.8%) are open to long-term engagements.

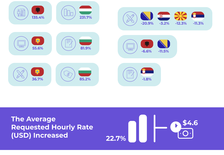
On average, gig workers have accumulated more than 2,000 billable hours, reflecting a high level of engagement on digital labour platforms.

3 Gigmetar Over Time (2021–2026): Return to the Growth Path

Although global factors affect all labour markets in the region in broadly the same direction, the pace and intensity of change vary across countries, reflecting their specific national characteristics.

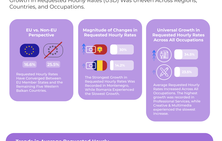
Over the past five years, the number of gig workers on Upwork in the region has increased by 24.3%, although growth has varied considerably across countries.





(Uneven) Growth Across Nearly All Occupations

Growth in the Gig Workforce Was Stronger Among Women.



Contributing to narrowing gender gaps in the share of women and in the growth of their requested hourly rates.

Countries Recording the Strongest Growth by Occupation

Countries Recording the Largest Decline in Gig Workers by Occupation

The Average Requested Hourly Rate (USD) Increased

Growth in Requested Hourly Rates (USD) Was Uneven Across Regions, Countries, and Occupations.

EU vs. Non-EU Perspective

Recorded Two Times Faster Wage Growth Between Non-EU Countries, Including Serbia, Ukraine, Bosnia and Herzegovina, Moldova, Belarus, Georgia.

Magnitude of Changes in Requested Hourly Rates

The Strongest Growth Was Recorded in Romania, Followed by Bulgaria, Serbia, Ukraine, Bosnia and Herzegovina, and Moldova.

Universal Growth in Requested Hourly Rates Across All Occupations

Average Requested Hourly Rate Increased Across All Occupations. The Highest Growth Was Recorded in Software Development, Data Entry & Administrative Services, Creative & Multimedia Services, and Sales & Marketing.

Trends In Average Requested Hourly Rates (USD/hour) by Country
May2021 - May 2026

The Strongest Growth Was Recorded in Romania, Followed by Bulgaria, Serbia, Ukraine, Bosnia and Herzegovina, and Moldova.

Women Gig Workers in Southeast Europe Are the Clear Winners of the Changes in the Digital Labour Market.

Not only did the number of women gig workers increase in both absolute and relative terms, but their requested hourly rates also grew faster than those of men.

Requested Hourly Rates Increased More Among Women Gig Workers Than Among Men.

They, however, still earn less than their male counterparts on average.

The Strongest Growth Among Women Was Recorded in Professional Services.

The Strongest Growth Among Women Was Recorded in Professional Services.

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