


The background of the slide features a scenic landscape with a river winding through a valley, surrounded by mountains and a forest. The sky is blue with white clouds. Overlaid on the right side of the image is a large, colorful abstract graphic consisting of several overlapping, rounded shapes in shades of purple, teal, green, and orange. The main title is centered in the upper half of the image, and the subtitle is positioned in the lower left quadrant.

# Platform Work and New Forms of Work

Evidence from ETF  
Partner Countries



# New Forms of Work in the Digital Era

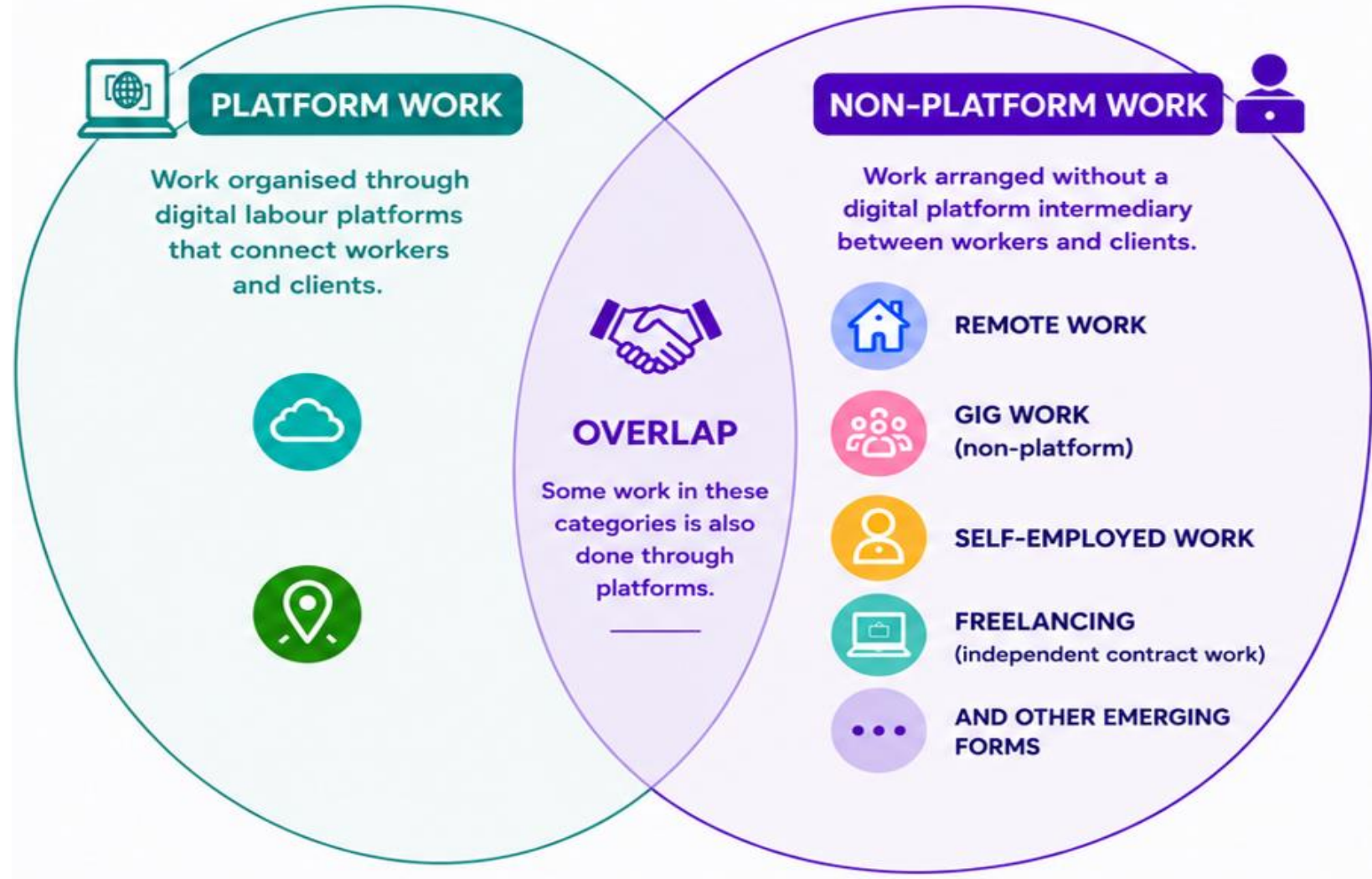


## PLATFORM WORK

Work organised through digital labour platforms that connect workers and clients.

It is mainly divided into:

- **ON-LOCATION**  
Work that requires the worker to be physically present at a specific location.  
**Examples:** ride-hailing, food delivery, home services
- **ONLINE**  
Work that can be done remotely through digital platforms.  
**Examples:** software development, graphic design, translation, online tutoring



# ETF Research Methodology (2021-2024):



## Desk research

Review of research, statistics, policies and regulations



## Automated data collection

Web scraping from online labour platforms  
(e.g. Upwork, Freelancer, Guru)



## Stakeholder interviews

Interviews with policymakers, professional associations and platform representatives



## Focus Groups

Discussions with online platform workers in selected regions



# Main findings from regional studies (2021–2024)

## Key dimensions explored:

- **Prevalence of platform work**
- **Attractiveness of new forms of work**
- **Worker profiles**
- **Skills and learning in platform work**
- **Opportunities and challenges**

Findings are based on ETF regional studies  
conducted between 2021 and 2024

# Prevalence of online platform work

- Increasing number of online platform workers across the EU Neighborhood and Central Asia
- **Main platforms:** Upwork, Freelancer, or Guru, while on-location market is often dominated by domestic platforms
- **Leading countries in the respective regions:**
  - Serbia and North Macedonia
  - Kazakhstan (Central Asia)
  - Ukraine and Armenia (EaP region)
  - Egypt and Palestine (SEMED region)



# Attractiveness of new forms of work

## Motivating factors

### Online platform work

- Temporal and spatial flexibility
- Opportunity for higher incomes than on local labour markets in stable currency
- Opportunity to gain experience and skills

### On-location platform work






- Temporal flexibility
- Additional income
- Low entry barriers
- Lack of other employment opportunities

## Discouraging factors

Low job security  
Lack of social protections  
Lack of skill and career development opportunities



# Worker profiles

	Online	On-location
	Mostly men	Mostly men
	Mostly young	Mostly young
	Tend to have higher education	Different education levels
	Creative, multimedia and software development, data entry and translation	Predominantly ride-hailing and delivery
	Self-employed or working informally	Self-employed or working informally

# Skill development in platform work

## Online

Higher educational attainment

### Needed skills:

- Self-regulated learning
- Basic and advanced digital skills
- Professional domain skills
- Knowledge of foreign languages
- Social and entrepreneurial skills

- Skills development mainly through self-learning
- Online platform work not always seen as a future career asset

## On-location

Workers often overqualified

### Mostly low skills requirements:

- Limited opportunities for skills development
- Some platforms investing in advanced skills training



# Strengths, weaknesses, opportunities and threats

## **New employment opportunities**

**Labour market integration of youth and women**

**Low entry barriers in on-location platform work**

**Higher income prospects in both online and on-location platform work**

**On-the-job skill development opportunities in online labour platforms**

**Flexible work arrangements**

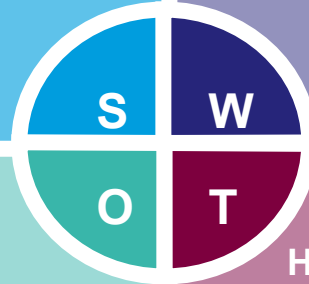
**Increasing job quality in the mapped region**

**Proliferation of graduate level jobs through online freelancing and platform work**

**Development of skills which are in demand in local and global labour markets**

**Substitution for the migration and brain drain**

**Attraction of highly skilled migrants**



**Undeclared work and tax evasion**

**Lack of worker social protection and labour rights**

**Irregular incomes, particularly on online labour markets**

**Lack or insufficient access to skills development and certification opportunities**

**Problem of deskilling in on-location platform work**

**High global competition on online labour markets and unequal access to work**

**Gaps in digital infrastructure and accessibility to it**

**Insufficient digital, occupational, business and language skills**

**Lack of acknowledgement of the new forms of employment in regulation and policy**

# 2026 Study: Updating the methodology for measuring platform work in Ukraine

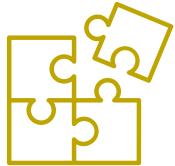
Updated methodology and new survey components aim to:



Improve the identification and measurement of platform work activities



Better understand how digitalisation transforms: skills, work organisation, and labour market participation



Capture dimensions often missing from existing data collection, including:

- *algorithmic management*
- *platform reputation systems*

- *digital visibility of skills*
- *and new forms of worker-platform interaction*



Strengthen the evidence base on the realities and working conditions of platform workers



Support future labour market analysis and policy development

# Thank you for your attention!

Questions and discussion

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