

BACKGROUND PAPER

Mapping platform work in *North Macedonia*

Darko Antikj

Jasminka Frishchikj

About EUROPEUM

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.

About the author

Darko Antikj is Budget Monitoring and Analysis Coordinator at the Association for Emancipation, Solidarity and Equality of Women (ESE), and **Jasminka Frishchikj** is Executive Director at the same organization.

About the project

This paper was produced within the framework of *The Platform Revolution*, an eight-partner research initiative funded by **Stiftung Mercator** and coordinated by EUROPEUM. The project seeks to advance fairer conditions for platform workers in the Visegrád Four and Western Balkans regions by examining national contexts, fostering a network of organizations engaged in platform work research, and promoting evidence-based policy change.

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1. Characteristics of platform work

Platform work in the Republic of North Macedonia (RNM) consists of online platform work and on-location platform work. However, there are no national statistics showing the share of online and on-location platform workers in the total number of platform workers. Individuals in RNM use platforms to secure income or supplement earnings from traditional jobs.¹ International clients typically hire Macedonians for online services via platforms headquartered abroad. Platforms established and managed by local entrepreneurs are primarily used for on-location services.

According to estimates, among online workers, 32% engage in creative and multimedia work, while 27.2% specialize in software development and technology.² On-location work is dominated by food and goods delivery.

Key platforms include Beeride, Taxiglobal (ride-hailing); Korpa, Kliknijadi, Paket, Foodguru, Wolt (food delivery); Fitkit (health and fitness); Freelancers (project platform); and Nativeteams (facilitates payments and employment). Popular international platforms include Upwork, Freelancer.com, Guru.com, Hubstaff Talent, Fiverr, Pangea, PeoplePerHour, and Toptal.

Online platform workers in North Macedonia tend to be highly skilled and educated, while on-location workers are generally younger and less formally educated. Yet, no precise data on their skills or education is officially available.

Based on interviews with platform workers in the country, the majority receive payments for their work through PayPal and Payoneer. On-location workers, on the other hand, are typically compensated via contracts or cash. However, in both cases, these payment methods remain outside the official financial system. Between 2020 and

¹ International Labour Organization. Executive Summary: Digital Labour Platforms and the Future of Work. Geneva: ILO, 2018 and interviews with freelancers. <https://www.ilo.org/publications/digital-labour-platforms-and-future-work-towards-decent-work-online-world>.

² European Training Foundation. Western Balkans: Embracing the Digital Age – Country Report North Macedonia. September 2022. <https://www.etf.europa.eu/sites/default/files/2022-09/WB%20Embracing%20digital%20age%20Country%20report%20North%20Macedonia%20EN.pdf>.

2023, the average annual share of platform workers was estimated to be 0.67% of the total number of active workers (i.e., individuals currently employed or engaged in the labor force).³

In the period from 2020 to 2023, on average, 60.38% of all platform workers were men, and 39.62% were women. Online platform workers tend to be highly skilled and educated.⁴ Many have tertiary education. Workers engaged in on-location platform work tend to have lower education levels.⁵ These workers are more likely to be younger and less formally educated compared to online platform workers. However, precise and segregated data on skills and education of platform workers is not available for RNM.

2. Driving factors

The Macedonian workforce's tendency to gravitate toward platform work and informal jobs is largely influenced by economic instability (since platform work mitigates the risks of unstable formal jobs despite not providing benefits like pensions or health insurance);⁶ barriers to formal entrepreneurship (absence of low-cost financial schemes from private banks and funds to support entrepreneurs, lack of government programs and support, and bureaucratic hurdles in starting and maintaining businesses);⁷ and workers' demand

³ Due to the lack of national statistics and regulation on platform work, the exact number of platform workers in the country cannot be precisely determined. For the purposes of this analysis, and to estimate the number and trends of platform work, data from Gigmetar for 2020, 2021, and 2022 were used. According to this data, Macedonia had 254.1 gig workers per 100,000 population in 2020, 248.9 in 2021, and 331 in 2022. The number of platform workers for 2023 was calculated based on a linear regression model, using the linear trend from previous years. It is estimated that in 2023, Macedonia had 354.9 gig workers per 100,000 population. (Public Policy Research Center. Gigmetar Region Accessed January 22, 2025. <http://gigmetar.publicpolicy.rs/en/region-en-2024-2/>. The population data was sourced from the State Statistical Office of North Macedonia. Population and Workforce Data. Accessed January 22, 2025. https://makstat.stat.gov.mk/PXWeb/pxweb/mk/MakStat/MakStat_PazarNaTrud_PazarTrudArhiva_RabotoSposobnoNaselenie/001_PazTrud_Mk_rabotosposobno1_ml.px/).

⁴ Nikica Mojsoska Blazhevski, Aleksandar Ristovski, and Marjan Petreski, Non-Standard Forms of Employment in North Macedonia: Final Integrative Report (Geneva: International Labour Organization, 2021). <https://trudovopravo.mk/wp-content/uploads/2022/04/Non-Standard-forms-of-Employment-in-North-Macedonia-EN-FINAL.pdf>.

⁵ Mojsoska Blazhevski, Ristovski, and Petreski.

⁶ Raveni, Arbresh. Labour Market Flexibility in Transition Countries: A Case Study of North Macedonia. June 2021.

https://www.researchgate.net/publication/370801394_Labour_market_flexibility_in_transition_countries_a_case_study_of_North_Macedonia.

⁷ Dimitrova, Makedonka. Entrepreneurship Ecosystem in North Macedonia. 2020.

<https://socijalendijalog.mk/entrepreneurship-ecosystem-in-north-macedonia-market-assessment-2/?lang=en>.

for flexibility (work-life balance, economic necessity, and task-based work preference).⁸ The desire for autonomy and digital work opportunities underscores the growing popularity of these employment forms.⁹ However, systemic issues such as a lack of government support for entrepreneurship, high unemployment or skill mismatches¹⁰ continue to drive many workers toward informal and platform-based employment as practical alternatives.

3. Country specific impact: benefits and challenges

Based on the interviews conducted with a few platform workers, platform work provides significant benefits and challenges to workers, the economy and the state. As for the benefits, platform work offers flexibility regarding location and working hours, enabling collaboration with international clients and allowing workers to engage in projects unavailable locally. Interviewees valued the opportunities to independently select health and pension insurance,¹¹ develop entrepreneurial skills, maintain independence from employers, and earn supplemental income.¹²

Economically, platform workers contribute positively by reducing the unemployment rate, increasing consumption, and stimulating private investments, as their earnings are often redirected into real estate and financial or other markets, which support GDP growth.

However, platform work also presents notable challenges for both workers and the state. Workers face risks such as breaches of agreed terms, non-payment for services, and a lack of social protections like pension and health insurance. The absence of regulatory

⁸ Raveni, Arbresh. Labour Market Flexibility.

⁹ European Training Foundation. Western Balkans: Embracing the Digital Age. Accessed January 22, 2025. <https://www.etf.europa.eu/en/document-attachments/embracing-digital-age-future-work-western-balkans-north-macedonia>.

¹⁰ Field research revealed that those engaged in on-location platform work are often overqualified for the work they perform, for example, students often work as couriers where low skills are needed and upskilling opportunities are lacking. Upskilling and career opportunities on on-location platforms would be important, but are not yet visible.

¹¹ Platform workers in North Macedonia tend to prioritize private health insurance and investment funds over contributing to mandatory public benefits, such as the national health and pension funds. As a result, they often opt out of the formal social protection system.

¹² European Training Foundation. Western Balkans.

mechanisms leaves workers vulnerable and unprotected (e.g. informal employment risks, the need for better regulations, and precarious working conditions). Delivery and ride-hailing platform workers face the highest precarity¹³ due to bogus self-employment and a lack of social protection. Gender disparities and career progression issues are also mentioned as challenges in some studies.¹⁴ For the state, issues include reduced tax revenues, limited oversight of their income streams, and difficulties in monitoring platform-related business activities.

4. Current national regulatory landscape and EU criteria

4.1. Classification of platform work

4.1.1 Recognition of platform work in national regulation

In North Macedonia, platform work is not formally recognized as a distinct category, nor is there a dedicated regulatory framework specifically addressing the rights and obligations of platform workers. However, two main sets of laws indirectly relate to it.

The first set includes laws that regulate the operation of platforms, providing a framework for their functioning as legal entities. This includes the Law on Electronic Commerce, the Law on Trade, the Law on Protection of Competition, and the Law on Personal Data Protection.¹⁵ There is no dedicated register for online platforms in North Macedonia.

The second set encompasses laws that indirectly regulate the rights and obligations of platform workers. These laws address the status, social protection, and tax obligations of platform workers. They include the Law on Labor Relations, the Law on Contributions for Mandatory Social Insurance, the Law on Obligations, the Law on Copyright and Related Rights, and the Law on Personal Income Tax.

¹³ Mojsoska Blazhevski, Ristovski, and Petreski. Non-Standard Forms of Employment in North Macedonia.

¹⁴ European Training Foundation. Western Balkans.

¹⁵ Republic of North Macedonia. Law on Electronic Commerce. Official Gazette No. 133/2007; Republic of North Macedonia. Law on Trade. Official Gazette No. 28/2004; Republic of North Macedonia. Law on Protection of Competition. Official Gazette No.145/2010; and Republic of North Macedonia. Law on Personal Data Protection. Official Gazette No. 42/2020.

4.1.2 Status of platform workers

Platform workers in RNM fall into four main categories, each with differing levels of rights and protections. Self-employed individuals, who are presumed to make up the majority, must register and pay their own social contributions under the Law on Contributions for Mandatory Social Insurance¹⁶ which requires health and pension contributions and imposes penalties on those who fail to comply. Those formally employed through platforms are protected by the Law on Labor Relations,¹⁷ which offers protections for wages, contributions, and safeguards against unlawful dismissal, with fines imposed for breaches, though such arrangements appear to be uncommon. Temporary platform workers hired through agencies are covered by the Law on Private Employment Agencies,¹⁸ which ensures minimum employment standards, but data on their prevalence is not available. Platform workers who provide services under the Law on Obligations¹⁹ or the Law on Copyright and Related Rights²⁰ operate through service or copyright agreements rather than employment contracts. They are not required to register for social contributions but must pay personal income tax on their earnings.

4.2. Recent court cases

Platform work in RNM remains unregulated, resulting in an absence of judicial practice in this area. However, disputes related to platform-based services, such as employment classification and contractual obligations, could be adjudicated under existing labor and contractual laws, depending on the nature of the case. Since there is no dedicated legal framework for platform work, there are no known court rulings explicitly addressing its regulation.

¹⁶ Republic of North Macedonia. Law on Contributions for Mandatory Social Insurance. Official Gazette No. 142/2008.

¹⁷ Republic of North Macedonia. Law on Labor Relations. Official Gazette No. 62/2005.

¹⁸ Republic of North Macedonia. Law on Private Employment Agencies. Official Gazette No. 113/2018.

¹⁹ Republic of North Macedonia. Law on Obligations. Official Gazette No. 18/2001.

²⁰ Republic of North Macedonia. Law on Copyright and Related Rights. Official Gazette No. 115/2010.

4.3. Union representation for platform workers

Platform workers in RNM are largely excluded from union representation and collective bargaining due to their classification as self-employed rather than employees. The Law on Labor Relations²¹ and the Constitution of the Republic of North Macedonia²² guarantee unionization rights only for employees, leaving platform workers without formal protections. To address this gap, freelancers are independently organizing through events like conferences and roundtables to advocate for better working conditions. For-profit platforms such as [Freelancefrom.mk](https://freelancefrom.mk) and [Nativeteams.com](https://nativeteams.com) provide critical support by offering legal guidance on taxes, social contributions, and business registration. Native Teams, in particular, facilitates employment solutions for freelancers and remote workers, enabling them to access social benefits and streamline payment processes while ensuring compliance with local regulations.

4.4. Current policy debates

Institutions in North Macedonia, including the Ministry of Labor and Social Policy, the Ministry of Finance, and the Employment Agency, have expressed openness to addressing freelancers' needs. However, labor laws remain rigid and lack provisions for new forms of employment. Additionally, freelancers advocate for a national strategy to strengthen the ecosystem, promote remote work, and reduce brain drain.²³

Efforts are underway to draft legislation regulating platform work and establishing a registry for voluntary pension and health insurance contributions, aiming to include platform workers in the social insurance system. The Employment Agency of RNM²⁴ has confirmed that platform work regulation is part of the Draft Labor Relations Law, which remains under public discussion but has not been adopted since its announcement in

²¹ Republic of North Macedonia. Law on Labor Relations. Official Gazette No. 62/2005, Articles 196–205.

²² Republic of North Macedonia. Constitution of the Republic of North Macedonia. Official Gazette No. 52/1991, Article 37.

²³ Denar. "Тркалезна маса на тема развој на македонскиот фриленс екосистем." April 18, 2024. <https://denar.mk/304263/makedonija/trkalezna-masa-na-tema-razvoj-na-makedonskiot-frilens-sistem>.

²⁴ Employment Agency representative, personal communication, 13 January 2025.

2021. On November 13, 2024, the ILO hosted a tripartite meeting²⁵ with labor law experts and social partners to discuss the Draft Labor Relations Law, focusing on international labor standards, collective bargaining, and freedom of association.

As part of broader efforts to formalize informal work, the Strategy for Formalizing the Informal Economy, 2023–2027,²⁶ introduces targeted measures to support freelancers and other independent workers, including those engaged in platform work. Measure 2.3²⁷ focuses on developing digital tools, including a functional platform for the voluntary registration of freelancers and other independent service providers, such as workers on digital platforms, into the mandatory social insurance system. Measure 2.4²⁸ proposes a legal framework for freelancers' access to social insurance and tailored tax policies, along with a new Labor Law to address dynamic labor market changes.

Labor laws in North Macedonia remain rigid and lack provisions for new forms of employment, despite institutional openness and ongoing efforts to regulate platform work and support freelancers.

²⁵ Portal Rabotnik. "КСС дел од трипартитната средба на МОТ за нацрт Законот за работни односи", November 14, 2024. <https://rabotnik.com.mk/ксс-дел-од-трипартитната-средба-на-мот/>.

²⁶ Ministry of Finance. Стратегија за формализирање на неформалната економија во Република Северна Македонија, 2023–2027 година. Скопје: Министерство за финансии, 2023. https://finance.gov.mk/wp-content/uploads/2023/09/Strategija-za-neformalna-ekonomija-2023-2027_korekcija-28082023-2-1.docx&ved=2ahUKewjGjtC27MiLAXUQBNSEHanPOycQFnoECA8QAQ&usg=AOvVaw3xMkCEHv_z0xAGqeTKsUC9

²⁷ Ministry of Finance. Стратегија за формализирање на неформалната економија во Република Северна Македонија, 2023–2027 година, page 65. Скопје: Министерство за финансии, 2023. https://finance.gov.mk/wp-content/uploads/2023/09/Strategija-za-neformalna-ekonomija-2023-2027_korekcija-28082023-2-1.docx&ved=2ahUKewjGjtC27MiLAXUQBNSEHanPOycQFnoECA8QAQ&usg=AOvVaw3xMkCEHv_z0xAGqeTKsUC9

²⁸ Ministry of Finance. Стратегија за формализирање на неформалната економија во Република Северна Македонија, 2023–2027 година, page 65. Скопје: Министерство за финансии, 2023. https://finance.gov.mk/wp-content/uploads/2023/09/Strategija-za-neformalna-ekonomija-2023-2027_korekcija-28082023-2-1.docx&ved=2ahUKewjGjtC27MiLAXUQBNSEHanPOycQFnoECA8QAQ&usg=AOvVaw3xMkCEHv_z0xAGqeTKsUC9

4.5. EU level

From 2020 to 2024, the EU Progress Reports for North Macedonia²⁹ consistently highlight challenges in aligning labor market policies with EU standards, with no explicit mention of platform work. Common themes include tackling undeclared work, enhancing labor inspections, and improving social protections, particularly for vulnerable groups like women, Roma, and youth. According to these reports, over the years, modest progress has been made, including adopting new strategies to formalize the informal economy (2023–2027) and expanding active labor market measures, such as the Youth Guarantee Scheme. However, institutional weaknesses, limited social dialogue, and persistent gender disparities remain significant obstacles. While platform work remains unaddressed, the focus on formalizing work and strengthening social protections lays a foundation for future discussions.

²⁹ European Commission. North Macedonia Reports. Accessed January 22, 2025. https://enlargement.ec.europa.eu/enlargement-policy/strategy-and-reports_en.

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