



# NEW FORMS OF WORK AND PLATFORM WORK IN THE SOUTHERN AND EASTERN MEDITERRANEAN

Regional report

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# Preface

Social, economic and technological changes have given rise to new forms of employment, many of which are very different from traditional types of work. These new modes transform the usual one-to-one relationship between employer and employee. They are characterised by unconventional work patterns and contractual relationships, as well as non-traditional places, durations and schedules of work, the increased use of information and communication technologies (ICT), or a combination of the above (Mandl, 2020).

As in the regular economy, flows of capital and labour are the two key elements of the collaborative and platform economy. Examining these flows allows us to distinguish between two types of collaborative online platforms (Farrell and Greig, 2016):

- digital **labour platforms** that connect customers with professionals (freelancers) or contingent workers who carry out specific projects or assignments (e.g. TaskRabbit, Freelancer, Deliveroo, Uber) – **these platforms are the focus of this study.**
- digital **capital platforms** that connect consumers with providers who lend money, lease assets or sell goods (e.g. Airbnb, HomeAway, Etsy, Amazon, eBay) – **these platforms fall outside the scope of this study.**

This ETF study focuses on **work on online and on-location digital labour platforms** and **off-digital freelancing platforms** in the Southern and Eastern Mediterranean Region. The study aims to better understand the trends and related policy implications for employment, skills and human capital policies, notably for women and young people. It is the fourth study of the same kind, with the same methodology, applied in four different ETF regions: the Eastern Partnership, the Western Balkans, Central Asia (upcoming) and SEMED (see ETF 2021c, ETF 2022b)<sup>1</sup>.

This report is the outcome of the consolidation of nine national reports (Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Palestine<sup>2</sup> and Tunisia), produced with the multidisciplinary mixed-method approach (desk research and literature review, analysis of available statistical data, interviews, a qualitative survey, and use of big data). The related information and data cover the period from January 2023 until end of September 2023, and therefore do not reflect the current situation of heightened conflict in the Middle East.

This report was prepared for the ETF by PPMI and Greatvisory. The ETF team supervising the research was led by Abdelaziz Jaouani, and composed of Sabina Nari and Stefano Lasagni, in one of the ETF projects, coordinated by Francesca Rosso. The report has been peer-reviewed by Lisa Rustico and Iwona Ganko.

The ETF would like to thank all the stakeholders in the nine partner countries covered by this study who have engaged throughout the process and provided valuable input. The nine national reports are available on the ETF webpage: [Resources | ETF \(europa.eu\)](#)

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<sup>1</sup> This study complements the analyses of similar research carried out in the Western Balkans and Eastern Partnership (EaP) countries and will feed into EU efforts in the Mediterranean region as part of the 2021 New Agenda for the Mediterranean. For more information, see ETF 2021c and ETF 2022b.

<sup>2</sup> This designation is not to be construed as recognition of a State of Palestine and is without prejudice to the individual positions of the Member States on this issue.

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## Executive summary

This study analyses the trends related to the new forms of work and platform work in the Southern and Eastern Mediterranean (SEMED) region and offers policy pointers regarding the region's employment, skills development and digitalisation initiatives. The study includes research on nine SEMED countries – Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Palestine<sup>3</sup>, and Tunisia. The new forms of work that this study focuses on are **online platform work**, meaning the remote delivery of services via online labour platforms; **online freelance work outside of digital platforms**<sup>4</sup>, and **on-location platform work**, meaning the physical delivery of services with online platform matching and administration between customers and service providers. The methods used in this research include desk research, scraping data from online labour platform websites, interviews with local stakeholders, and focus groups with online platform workers.

These new forms of work represent a global phenomenon that has been gaining traction in the SEMED region over the past two decades. **Online labour platforms** have been present in the region since the mid-2000s, with international English-language platforms (e.g. Upwork, Freelancer, Guru) and regional Arabic-language platforms (e.g. Mostaqil, Khamsat, Ureed) being most prevalent.

There are hundreds of thousands of registered **online platform workers** in SEMED. While this figure continues to grow, the number of active workers is lower, most likely in the tens of thousands. Most of the region's registered online platform workers are based in Egypt, followed by Morocco and Algeria, while Libya has the lowest number of online workers. The prevalence of active online platform work on a per capita basis is the highest in Palestine, followed by Egypt, Lebanon and Morocco, with Libya having the lowest rate. Creative and multimedia, and software and technology are the most frequent occupations among online freelancers in the region. Online platform workers are mostly young and male.

**On-location labour platforms** started emerging in the 2010s, with regional ride-hailing and delivery companies being the first entrants, later joined by international companies. Currently, at least 63 on-location platforms are active in SEMED. The most visible categories of on-location platform work are ride-hailing (e.g. Uber, Yassir and Gett) and delivery (e.g. Glovo, Careem, Yummy), with domestic, ancillary and care services platforms (e.g. FilKhedma, HomeHero) being the least developed and visible category in the region.

There is no reliable data on the number of **on-location platform workers** in the region, but the proliferation of on-location platforms is indicative of the growing popularity of this type of work. Similar to online platforms, young men tend to be most represented on ride-hailing and delivery on-location platforms, while women work more on care and cleaning platforms.

The main **motivating factors** for working on **online labour platforms** in SEMED are flexibility, a higher income and the opportunity to gain experience and skills, as well as the lack of employment opportunities locally. As regards **on-location platform work**, workers are attracted by low entry barriers, flexibility and the opportunity to earn additional income, as well as the lack of local job opportunities. The lack of job security, social protection and opportunities for skills development and career growth are the main **disincentivising factors** for working on **both types of platforms**. Problems with international payment systems and poor internet connection are disincentivising factors **only for online labour platforms**.

**Both online and on-location platform workers** in SEMED usually do not have employment contracts and operate under civil law, either by registering as **self-employed or by working informally**. Common problems linked with working under such circumstances are the **lack of security**

<sup>3</sup> This designation is not to be construed as recognition of a State of Palestine and is without prejudice to the individual positions of the Member States on this issue.

<sup>4</sup> Although online work outside of platforms falls within the study's scope, most of the conclusions are related to platform work due to more evidence being found on this during the research phase.



**of employment and social protection**, including health insurance, accident insurance and pension contributions. Furthermore, the lack of official employment status also hinders platform workers' attempts to unionise. **The lack of representation** of workers' interests makes it more difficult for them to advocate for better working conditions and stand up to the large power wielded by the platforms.

In most cases, platform work seemingly enables SEMED workers to earn **higher incomes than in similar off-platform jobs** in the local labour market. On **online platforms**, the average hourly rates that freelancers are asking are several times higher than local hourly wages, although this differs significantly between countries and men demand higher rates than women. However, **hourly rates on platforms and regular jobs cannot be directly compared** because only a minority of online workers manage to secure any work. They are required to do a lot of unpaid work to build their reputation on the platform, and to spend time applying for jobs and communicating with potential clients. Most online workers have irregular incomes, and the difference between accrued and requested rates usually differ. Work through **on-location platforms**, even in low-skill occupations, can sometimes provide a higher income than some traditional high-skill jobs. However, on-location platform workers do not have a guaranteed minimum wage and their income depends on their working hours. Furthermore, as they are responsible for their own work expenses, such as fuel and vehicle maintenance, their earnings are significantly lower when those expenses are subtracted.

**Working conditions are poor both on online and on on-location platforms**, although they differ significantly. **Online workers** are exposed to significant precarity caused by competition for a limited number of irregular jobs. In order to secure work and obtain positive ratings, they often spend time on unpaid work such as applying for jobs and building portfolios, and they accept exploitative relationships with clients. **On-location workers** are incentivised to work extremely long working hours to earn higher incomes, which leads to frequent accidents as well as various health problems. They are also exposed to frequent attacks and harassment in the workplace.

Most of the **online platform workers** in the SEMED region are highly educated. However, education is not a determining factor for success in platform work. Most of the workers work in fields unrelated to their qualifications and they constantly need to upgrade their skills to remain competitive on the platforms. To succeed on online platforms, workers need self-regulated learning skills, basic and advanced digital skills, expertise in the professional domain, as well as social skills and knowledge of foreign languages, primarily English. Platforms and clients typically do not provide any form of training, due to the lack of obligations associated with this type of employment: most skills development occurs thanks to autonomous learning through online courses and tutorials. However, some platforms like PeoplePerHour do provide limited training opportunities and award micro-credentials in the form of certificates. Career advancement in online work is much more limited than in traditional employment and workers need to create their own career paths. Furthermore, work experience from digital platforms is rarely seen as an asset in the labour market, although some employers might appreciate the skills obtained through such work, such as communication and independence.

**On-location platform work** mostly requires a low level of skills, with the exception of some specialist jobs. However, on-location workers have varying levels of education and are often overqualified for the job. On-location platform work provides extremely limited opportunities for skills development and career advancement, which is one of the main reasons why many workers intend to work on these platforms only temporarily.

In SEMED, platform work has substantial **strengths**, providing workers with avenues to secure employment, elevate income levels, embrace flexible working arrangements and, in some cases, develop skills. However, these advantages coexist with many **weaknesses**, such as poor social protection and labour rights, irregular income patterns, limited inclusivity, career and skills development opportunities, dependency on non-universally available digital infrastructure and lack of data on platform work. While the platform economy holds **opportunities** to counter high unemployment rates in the region and address the lack of prospects for young people, women and marginalised social groups, it is nevertheless crucial to refrain from framing this work as a universal

solution for unemployment; platform work may also reproduce labour market inequalities and comes with inadequate recognition and a lack of regulatory measures.

To harness the benefits of new forms of work and minimise the risks associated with them, policymakers in SEMED should focus on formulating **policies in three key areas: labour market and employment, skills development, and digitalisation.**

### **Labour market and employment policy recommendations**

1. Define the employment status of online and on-location platform workers and ensure their social protection at least through short-term initiatives and platform incentives.
2. Address pervasive informality through increased scrutiny of legal compliance and financial transparency.
3. Establish systems for monitoring platform work trends to support evidence-based decision-making, as there is a lack of data and research in the SEMED region. This can be achieved through obliging platform companies to report a minimum level of information on their workers/clients.
4. Support workers in transitioning to new forms of work through public employment services (PES).
5. Secure worker representation, especially for self-employed platform workers, to advocate for their interests and raise public awareness.
6. Leverage new forms of work to employ and empower social groups at a disadvantage in local labour markets: young people, women and refugees. This can be done through targeted skills development programmes for these groups and by promoting new forms of work.

### **Skills development policy recommendations**

1. Upgrade digital skills across the population, with specific attention to basic and advanced digital competencies. This should be accompanied by facilitating access to domain-specific micro-training, including through massive open online courses (MOOCs) and short online courses in collaboration with VET programmes. This approach can assist workers in keeping up with the rapidly evolving skill demands of online platform work.
2. Encourage self-regulated learning by developing autonomous learning competencies, as well as promoting entrepreneurial skills, from early education.
3. Enhance English language proficiency by expanding the coverage and quality of English courses, targeting not only students but also marginalised groups like refugees.
4. Ensure better skills recognition on digital platforms, for instance, through micro-internship initiatives and public portfolio-based systems, which can help validate skills and experience to potential employers both within and outside of online platforms.

### **Digitalisation policy recommendations**

1. Improve ICT infrastructure inclusivity, focusing on expanding high-speed internet access to rural areas and marginalised communities and providing essential hardware like PCs. The establishment of technology centres and co-working spaces can promote equitable infrastructure access.
2. Enhance access to international e-payment systems, particularly in countries like Libya, Palestine, and Lebanon, to facilitate transactions for online workers hired on international platforms.
3. Foster digital transformation in the private sector and collaborate with businesses to enhance skills development and employability for online workers. Supporting private sector digitalisation efforts can have far-reaching positive impacts beyond benefiting the workers in the focus of this study.



# Introduction

Over recent years, non-standard and new forms of employment have been growing in their variety and scale across the Southern and Eastern Mediterranean (SEMED) region. The COVID-19 pandemic further accelerated this through the even faster digitalisation of the economy and work. Many of these new forms of employment represent a significant transformation of what is understood as ‘traditional work’ – in terms of working conditions, work content and its regulatory and legal implications.

This study report presents the findings of the study on online work on and off digital platforms and on-location platform work in the SEMED region, conducted between January and September 2023. The research focuses on the emergence of these forms of employment, working conditions and worker profiles, and their implications for employment and skills development policies in nine SEMED economies: Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Palestine and Tunisia.

To examine these research topics, the study team employed a detailed conceptual framework on freelancing and platform work (presented in [Annex 1](#)), and used a mixed-method approach that integrated data from interviews, desk research, automatically collected data (big data analytics) and focus group discussions. A detailed description of this methodology is presented in [Annex 2](#).

The study team began by reviewing evidence on the main economic indicators, the broader labour market, young people and education, and digitalisation in the region. This data was collected through country-level research, which is also published in separate reports ([Resources | ETF \(europa.eu\)](#)). These country-specific findings were then fed into a comparative analysis, presented in the first chapter of this report, [Setting the scene](#).

The research also reviews developments in platform and online work in the SEMED region. Here, we differentiate between online work carried out on and off digital platforms, and on-location platform work. Online work is a type of work that can be carried out remotely, irrespective of the worker’s location, while on-location work requires workers to be in a specific physical location in order for the task to be implemented. The second and third chapters, Chapter 2: Online work on and off digital platforms and Chapter 3: On-location platform work, combine country-specific and horizontal findings to present the most recent information regarding platform work in the region, providing an overview of the available data on the prevalence of this type of work, worker profiles and working conditions.

Lastly, the study identified the current regulations, policies and strategic approaches relating to these new forms of employment, and outlines the main potential policy pointers. These results are presented in the fourth and fifth chapters, [Chapter 4: Current regulation, policies and strategic approaches](#) and Chapter 5: Main findings and policy pointers.

# Chapter 1: Setting the scene

To comprehend the emergence of new forms of work such as online work on and off digital platforms and on-location platform work, it is essential to consider the local context. The macroeconomic landscape, labour market conditions and educational environment in the country plays a pivotal role in understanding the prevalence of digital platforms and novel work structures, as well as their appeal, worker demographics and working conditions. Furthermore, the presence of digital infrastructure and the extent of digitalisation in individual countries are fundamental prerequisites for the expansion of these digital working arrangements. This chapter offers an overview of these contextual factors, forming the foundation for understanding regional dynamics and cross-country variations in relation to the evolving work landscape.

## Main economic indicators

Countries in the SEMED region represent different degrees of economic development, have differently-structured economies, and have faced different economic challenges in recent years. Overall, the region has grappled with issues such as high unemployment rates, high inflation and limited foreign direct investment. The COVID-19 pandemic has further exacerbated these challenges, leading to disruptions in trade, tourism and overall economic activity. In addition, the region's macroeconomic outlook remains influenced by global factors such as the war in Ukraine, regional conflicts such as those in Palestine and Libya, and local political dynamics.

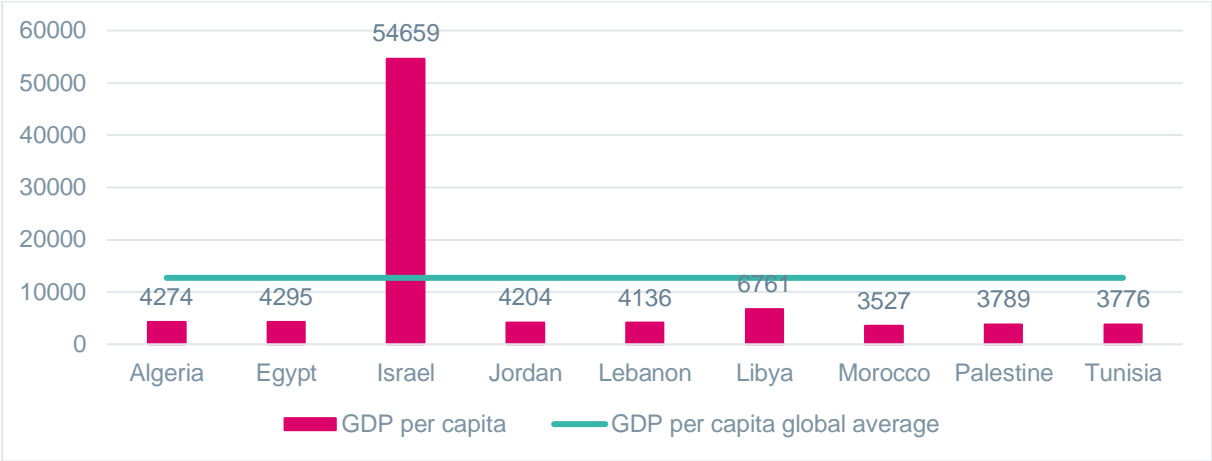
**The economic structure of SEMED countries shows significant diversity.** Services are the predominant contributor to the GDP of Lebanon (94%), Israel (72%), Jordan (61%), Tunisia (60%), Palestine (60%), Morocco (52%), Egypt (51%) and Algeria (42%). Conversely, services contribute a relatively low share to Libya's GDP (26%) (World Bank, n.d.a). The services sector has seen an upward trend across the region, while agriculture has declined as a share of GDP. With the exception of Algeria, Morocco and Egypt, where agriculture constitutes around 11% of GDP, the share of GDP contributed by agriculture in the region is generally low (World Bank, n.d.b). Libya (80%) and Algeria (42%) have the highest share of industrial contribution to GDP (World Bank, n.d.c), due to their significant reliance on hydrocarbon exports, making their GDP heavily dependent on global energy markets (International Trade Administration, 2023)<sup>5</sup>.

**Income levels in the SEMED region also vary, and most of them remain below the global average.** According to the World Bank income level classification, Morocco, Algeria, Tunisia, Egypt and Palestine are considered lower middle-income countries, while Jordan and Libya are classified as upper middle-income countries (Hamadeh et al., 2022). Israel is classified as a high-income country, with a GDP per capita of USD 54 659 – more than eight times that of the second-highest ranked economy in the region, Libya. The remaining SEMED countries have a GDP per capita ranging from approximately USD 3 527 in Morocco to USD 4 295 in Egypt – all significantly lower than the global average of USD 12 702 per capita (see figure below) (World Bank, n.d.d).

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<sup>5</sup> Libya is undergoing a serious political crisis, with two rival governments in different parts of the country struggling for control of hydrocarbon resources, the country's main export. The political situation is threatening to spill into open conflict. On top of this, the Libyan economy is still struggling with the consequences of COVID-19, the war in Ukraine, and the massive floods that hit the country in 2023. More about the Libyan economy and political situation can be found at: <https://www.worldbank.org/en/country/libya/overview> and <https://www.worldbank.org/en/country/libya/publication/libya-economic-monitor-september-2022>

**Figure 1. GDP per capita in 2022 across SEMED countries (USD)**



Source: World Bank, n.d.d

In terms of patterns of change in GDP, SEMED countries have followed similar trajectories, yet with some notable exceptions (see figure below). During the peak of COVID-19 lockdowns in 2020, most countries experienced negative growth. However, they have shown a steady recovery, with growth stabilising in 2022 at different rates, ranging from 1% in Morocco to 8% in Israel. Two major exceptions stand out. First, Libya’s change in GDP was characterised by extreme volatility, with massive surges and drops, primarily due to its overwhelming dependence on fossil fuel exports. Second, Lebanon has faced a consistent and significant decline in GDP over the five-year period observed, although the decline slowed in 2021 and 2022.

**Figure 2. GDP annual growth over a five-year period across the SEMED countries (%)**



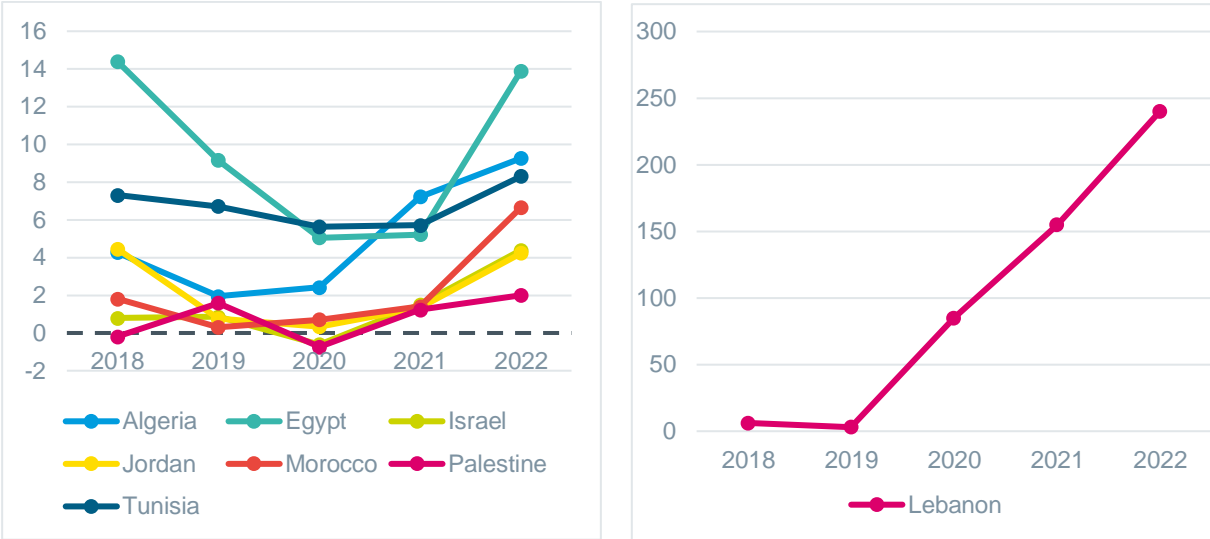
Source: World Bank, n.d.e.

Note: data for Lebanon for 2022 was missing from the database, and data from the World Bank’s Lebanon economic monitor (World Bank, 2022) was used instead.

Like many economies worldwide, the SEMED region has experienced heightened inflation since 2020, influenced by factors such as COVID-19 lockdowns and the war in Ukraine. However, there are notable differences in inflation patterns among the SEMED countries (see figure below). Lebanon stands out as a major outlier, having experienced extremely high inflation rates that have grown steadily since 2020, reaching a staggering 240% in 2022. Egypt and Tunisia have also experienced prolonged periods of high inflation, further exacerbated by the crises mentioned above. Algeria and Morocco, meanwhile, initially enjoyed low inflation rates in 2019 but have witnessed

significant increases over the past two years. Other countries have faced more moderate inflation increases, with Palestine having the lowest figures, hovering at around 2% in 2022. In addition, since the last available measurement in 2022, some countries have experienced significant inflation. For instance, Egypt saw inflation skyrocket to over 35% in June 2023 (Central Bank of Egypt, n.d.). As a result, the economic situation in the region remains unstable and is still developing under the influence of major global shocks such as the war in Ukraine, which has severely impacted food prices.

**Figure 3. Annual inflation rate across the SEMED countries (%)**



Source: World Bank, n.d.f.  
 Note: World Bank data covering Lebanon and Libya in 2022 was unavailable. Data from Trading Economics (n.d.) was used instead for Lebanon.

### Labour market

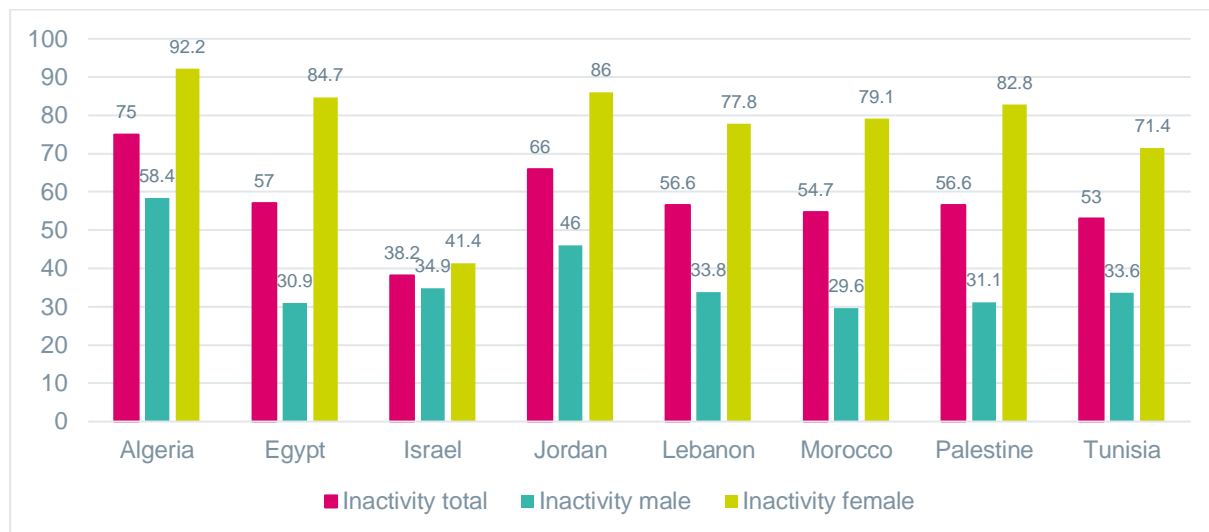
The labour market in the SEMED region, with the exception of Israel, faces significant challenges, being characterised by low levels of economic activity and employment rates, particularly among young people and women. This situation can be attributed to demographic pressures and ‘jobless’ economic growth, which has resulted in a surplus of labour supply compared with demand, but also to a low level of participation by women in labour markets. This lack of female participation in labour markets is linked with social norms, a lack of adequate infrastructure, and an imbalance in family responsibilities. Moreover, existing job opportunities are often informal in nature. Emigration is also a prevalent trend across the region, particularly among educated individuals, while the influx of refugees and immigrants has only limited engagement in the local labour market (Faltz, 2021). However, substantial variation exists between countries with regard to various aspects of labour market trends.

**Rates of economic inactivity in the region are among the highest globally**, with fewer than 50% of the working-age population actively participating in the labour market since 2019. In countries such as Lebanon and Tunisia, rates of economic inactivity have remained persistently high throughout the past decade, while others such as Algeria, Egypt, Jordan, Morocco and Palestine have experienced slight increases (Faltz, 2021). KIESE data<sup>6</sup> (see figure below) offers comprehensive statistics on economic inactivity in individual SEMED countries, with the exception of Libya. This data reveals differences in inactivity rates between countries, with Israel having the lowest and Algeria the highest. Notably, the data consistently show **disproportionately high inactivity rates among women**

<sup>6</sup> The Key Indicators on Education, Skills and Employment (KIESE) are a collection of statistics that form part of a broader set of information proposed by the ETF to enable a review of developments in the field of education, skills and employment in partner countries. More information is available at: <https://www.etf.europa.eu/sites/default/files/2022-11/KIESE%202022%20Final.pdf>

compared with men in all countries except for Israel. This is in line with previous findings that indicate the region's overall lag in terms of female labour force participation (World Economic Forum, 2022).

**Figure 4. Labour market inactivity across the SEMED countries (%)**



Source: ETF KIESE database.

Note: data for different countries was not always available for the same year. The data for Israel, Jordan, Morocco, Palestine and Tunisia is from 2021; the data for Lebanon is from 2022, while the last available data for Egypt and Algeria is from 2020 and 2019, respectively. Data for Libya is unavailable.

**Employment figures within the SEMED region exhibit significant variations** (see figure below).

Israel has the highest employment rates, while countries such as Algeria, Palestine, Lebanon and Jordan have the lowest. One common trend across the region is a pronounced gender disparity in employment. In every country of the region, the employment rate among women is lower than that among men. The gender gap is most striking in Algeria, where only 4.3% of women are in employment. Similarly, female employment in Jordan and Palestine remains below 10%, and is low in all countries except for Israel. Conversely, unemployment rates are the lowest in Israel and Egypt and the highest in Lebanon, Palestine and Jordan, with significant gender gaps across the region (see Figure 6 below). Unemployment figures are higher for women in all countries except for Israel. Female unemployment is the most pronounced in Algeria, with women twice as likely to be unemployed compared to men.

**Figure 5. Employment rates across the SEMED countries (%)**



**Figure 6. Unemployment rates across the SEMED countries (%)**



Source: ETF KIESE database.

Note: data for different countries was not always available for the same year. The data for Algeria, Israel, Jordan, Morocco, Palestine and Tunisia is from 2021; the data for Lebanon is from 2022, while the last available data for Egypt is from 2020. Data for Libya is unavailable.

**The SEMED region grapples with high rates of jobs in the informal economy**, with some countries having the largest shares of informal employment in the world (Faltz, 2021). The highest rates of informal employment in the region, excluding agriculture, are recorded in Egypt (59%), Lebanon (54%), Palestine (51%) and Jordan (50%), while in Tunisia the rate is lower, standing at around 30%. Informal employment is significantly higher among males in all countries except Lebanon (ILOSTAT, n.d.).

**The region experiences high rates of both emigration and immigration.** For decades, the region has experienced negative net migration, meaning the number of people leaving the country was higher than the number of those entering. However, the region is shifting into a transit hub or permanent home for many immigrants and refugees (Faltz, 2021). Due to this, countries such as Jordan and Lebanon now have higher rates of immigration compared with emigration.

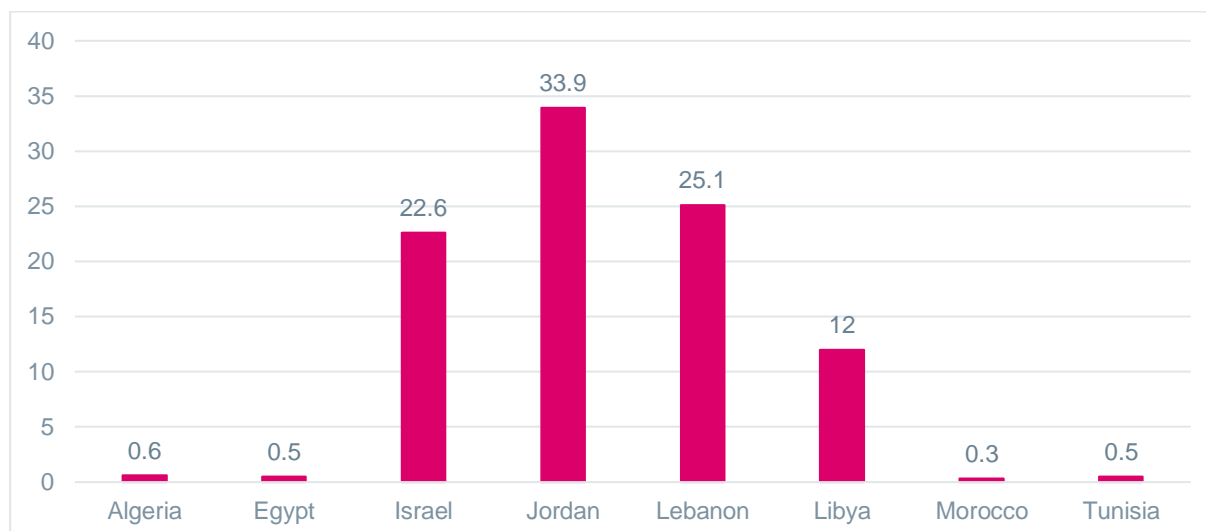
**SEMED countries significantly differ in terms of their volumes of emigration** (IOM, 2022). Among SEMED countries, Palestine has the most significant emigration rate, with 4 million Palestinians living outside of Palestine and 5 million within. Many Palestinians living abroad are settled in neighbouring countries like Lebanon. Egypt, meanwhile, has the largest diaspora in terms of absolute numbers. The main destination countries for the Egyptian diaspora are Gulf countries such as Saudi Arabia, the United Arab Emirates (UAE) and Kuwait. These are also the main destinations for emigrants from Jordan, where emigrants comprise around 8% of the population. Algeria, Morocco and Tunisia have large diasporas in France, while Lebanese people mostly emigrate to Anglophone countries such as the US, Australia and Canada. Given their large diaspora, the countries in the region have become among the largest recipients of international remittances in the world. In 2020, international remittance inflows to Egypt reached USD 30 billion or 8% of the country's GDP, making it the fifth-largest recipient globally. Remittances to Morocco and Tunisia accounted for around 5% of their total national GDPs (IOM, 2022).

**Immigration is also unevenly distributed between countries**, with Jordan, Lebanon, Israel and Libya hosting significant proportions of immigrants compared with their population size, with this figure reaching 34% in the case of Jordan (see figure below). Most immigrants in Jordan and Lebanon are refugees, and they mostly come from Syria and Iraq. Indeed, Lebanon and Jordan rank among the top five hosts of refugees globally in terms of share of national population. Libya – another country with a significant immigrant population – mainly hosts refugees from Somalia, Iraq and Syria. The situation in Israel is different, as most immigrants to the country arrive through permanent settlement



programmes. The majority of Israeli immigrants come from Eastern Europe, Morocco and Ethiopia (IOM, 2022).

**Figure 7. Immigrants (including refugees) as a share of the country's total population (%)**



Source: IOM 2022.

Note: data for Palestine are not available.

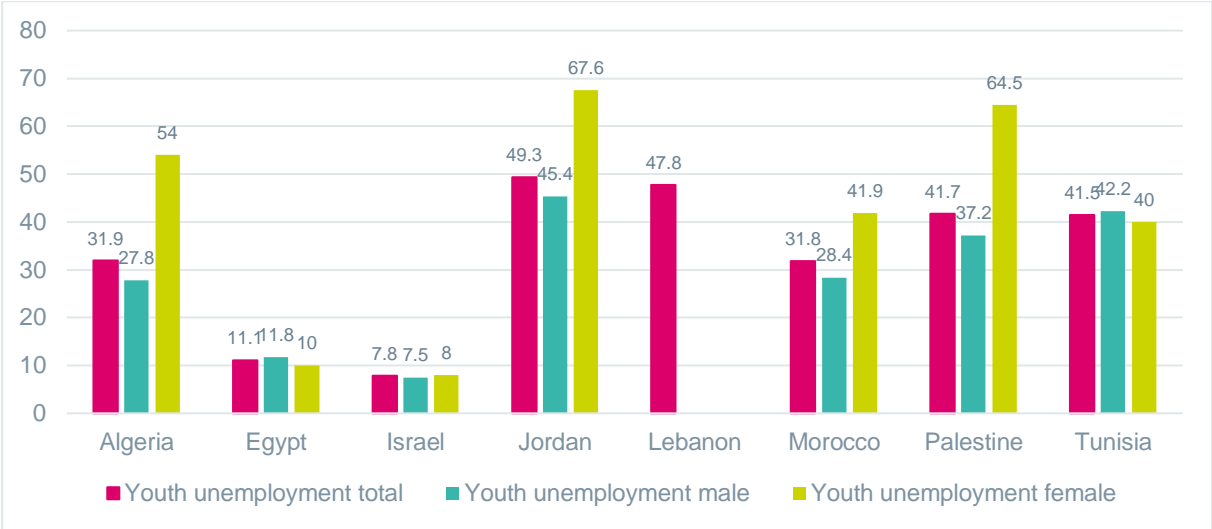
## Young people and education

**The SEMED region is characterised by an exceptionally high share of young people in the total population.** In 2020, more than 54 million people in the SEMED region were aged between 15 and 29. This figure is projected to increase by an additional 8 million people by 2030. The share of young people in the total economically active population varies from 22.6% in Algeria to 33.8% in Palestine (ETF, 2021a).

**In addition to the size of its youth population, the region faces challenges in providing them with quality educational and employment opportunities.** These challenges include high unemployment, lack of access to education, poor quality of education and a lack of relevant skill development (ETF, 2021a).

**Youth unemployment rates are high in all of the observed countries apart from Egypt and Israel.** Rates are particularly high in Jordan, Lebanon, Palestine and Tunisia. Significant gender differences also exist in youth unemployment, with a disproportionate number of young females being unemployed. This gender gap is the most pronounced in Algeria, Jordan and Palestine (see figure below). Compared with the total unemployment rates (see Figure 5 above), youth unemployment rates are significantly higher. This represents a major issue for regional development.

**Figure 8. Share of youth unemployment across SEMED region (%)**



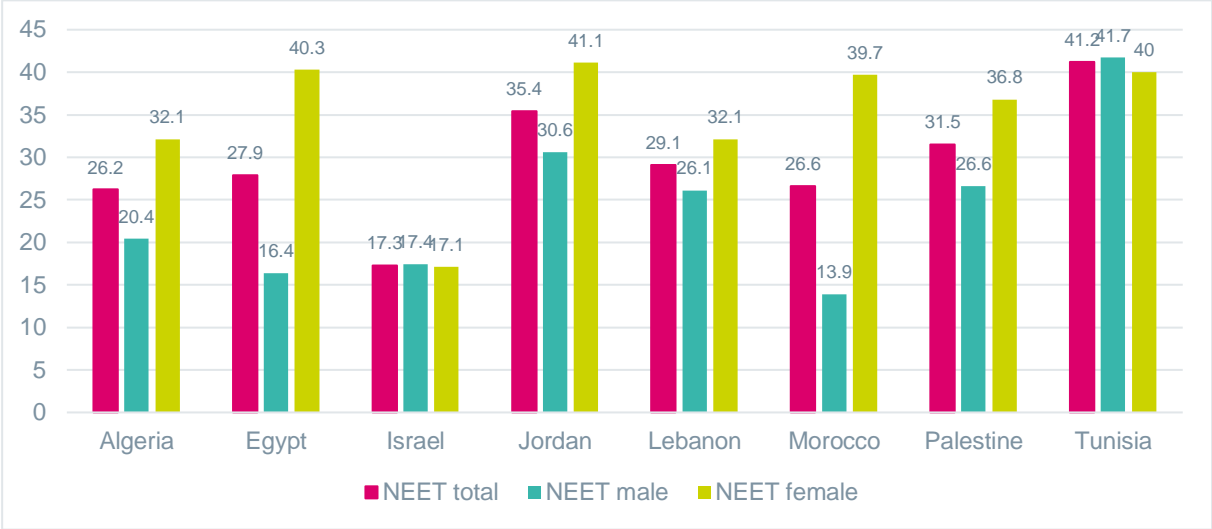
Source: ETF KIESE database.

Note: the statistics refer to young people aged 15 to 24 in all countries except for Algeria, where the age span is 16 to 24. Data for different countries was not always available for the same year. The data for Egypt is from 2020, and the data for Lebanon is from 2022. For all other countries, the data is from 2021. Youth unemployment data is unavailable for Libya, as is the gender breakdown for Lebanon.

There are many reasons for the high levels of youth unemployment in the region. Firstly, due to general macroeconomic situation, there is a lack of employment opportunities, driven by a weak private sector and a shrinking public sector. Furthermore, most small companies in the local market operate within the informal economy and do not offer quality employment opportunities for young people. In general, the economies in the SEMED region are unable to generate enough (skilled) jobs to cater for new entrants to the labour market. On top of this, existing employment opportunities for young people tend to be less attractive, with poor working conditions and a lack of security and social protection (ETF, 2021a).

**The SEMED region also faces significant challenges in terms of its large number of young people classified as NEETs** (those not in employment, education or training). As depicted in the figure below, the share of NEETs is high in all countries except Israel, where it stands at around 17% among both males and females. Conversely, Tunisia has the highest proportion of NEETs, with the figure exceeding 40%. Moreover, in all countries except for Israel and Tunisia, women are more likely to be outside education, employment and training. This trend can be partly attributed to the traditional role of women as caregivers, which may lead them to disengage from the labour market to attend to family and household duties. Consequently, a much bigger number of NEETs are educated women who remain economically inactive due to such responsibilities (ETF, 2021a).

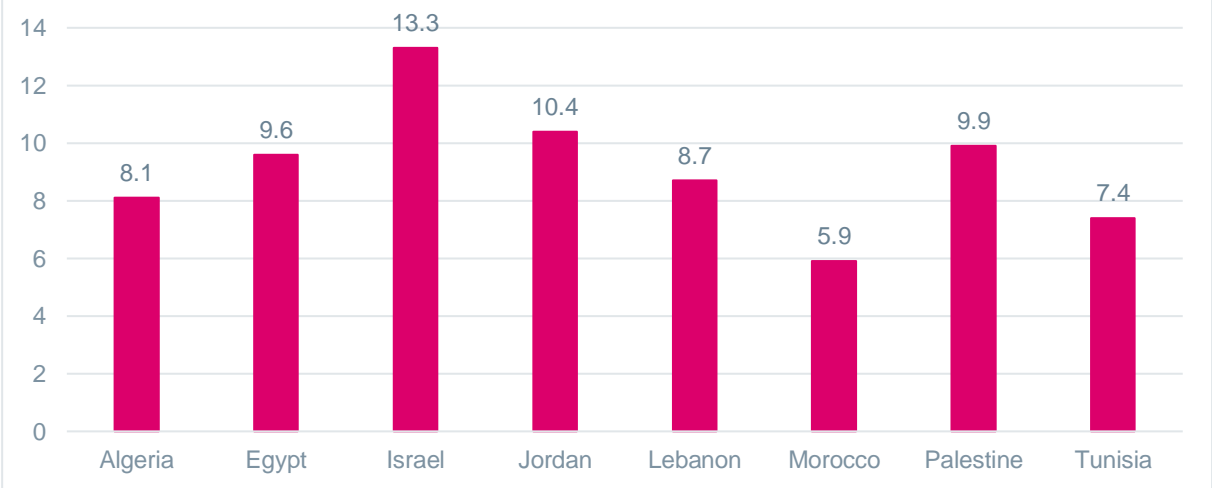
**Figure 9. Share of young people not in education, employment or training (NEET) across the SEMED countries (%)**



Source: ETF KIESE database.  
 Note: data for different countries was not always available for the same year. The data for Lebanon is from 2022; the data for Palestine and Tunisia is from 2021; the data for Israel, Jordan and Morocco is from 2020; and the data for Algeria and Egypt is for 2019. Data for Libya is unavailable.

**The region suffers from both low levels of education and poor-quality education (ETF, 2021a).** The average length of schooling in the region is low, with the exception of Israel, which stands out with over 13 years of schooling on average. In the rest of the countries, figures range from around 6 years of schooling in Morocco to around 10 in Jordan (see figure below).

**Figure 10. Average years of schooling across the SEMED countries**



Source: ETF KIESE database.  
 Note: data for all countries is from 2019, except Jordan and Palestine where the data is from 2020. Data for Libya was unavailable.

In addition to the short length of education in most countries in the region, **the quality of education has also been characterised as insufficient.** For example, PISA assessments for the region indicate significant problems in the quality of a basic education that is crucial for later labour market success (Faltz, 2021). Furthermore, even in the case of higher education, qualifications are often poorly exploited in the labour market. This is because the jobs on offer require lower levels of skills and qualifications, and because of educated young women’s frequent withdrawal from the labour market. In general, there is a lack of quality employment opportunities even for those with tertiary education (ETF, 2021a).

**Education systems in the region do not appear able to keep up with the ever more quickly changing demands of the labour market, causing occupational mismatches.** Skills mismatches are one of the major challenges for policymakers in the region, both when it comes to labour market entrants possessing insufficient skills, and in relation to the obsolete skills of the existing workforce. This situation could be due to insufficient flexibility and adaptation in educational and vocational systems to the needs of the professional work environment. Specifically, there is a lack of relevant processes for anticipating and matching skills, and of career guidance and adult learning (Jaouani, 2021; ETF, 2021a). For example, a study in Egypt showed that there is a sizeable gap between the skills taught at universities and the skills sought by international companies. The survey indicated that around 80% of companies surveyed struggle to find candidates with the right skills, particularly those relating to business analytics and digital transformation, but also including soft skills (ETF, 2021a; Talmage-Rostron, 2021).

Individual learning does not appear to compensate for the skills gap that education systems have been unable to address, as young people seldom use online learning sources to develop their skills individually. For example, a study by EFE found that only one-quarter of young people in Algeria had taken an online course (Barry and Dandachli, 2020). Out of those who had used online courses, only 11% used platforms that granted internationally-recognised certificates (EFE, n.d.a).

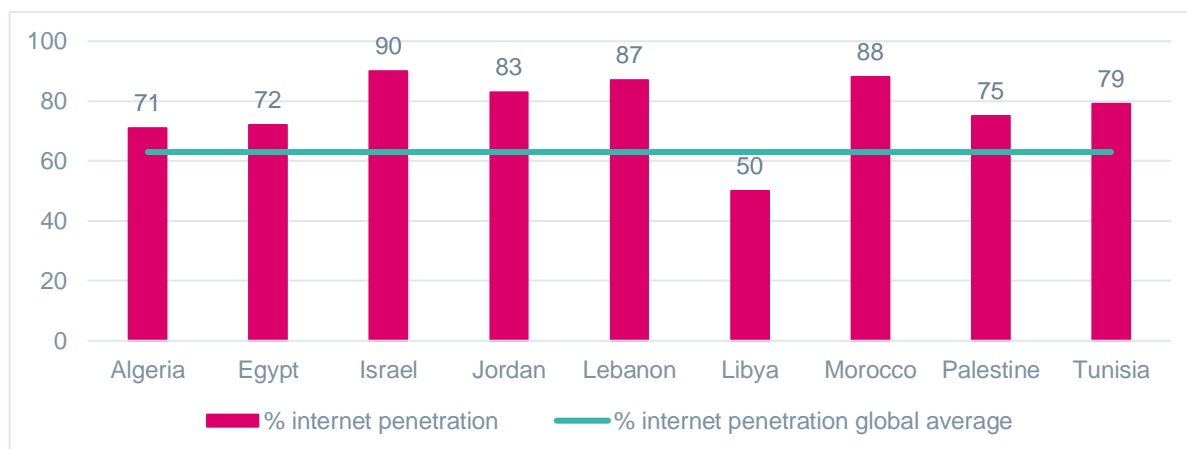
Ultimately, the low-skilled population in the region remains sizeable (Faltz, 2021), despite significant improvements in access to education, particularly when it comes to geographical coverage (ETF, 2021a). Existing skills development initiatives in the region are further discussed in the upcoming section [Skills and human capital development](#).

## Internet and digitalisation

To understand the emergence of new forms of work, it is important to take into account the factors facilitating the growth of digital economy, which enable this phenomenon. These include internet use, internet speed, the effective use of digital technologies, and digital skills.

**Noticeable differences in internet use are apparent between SEMED countries, although in general internet use is high.** In all countries apart from Libya, the percentage of the population using the internet is higher than the global average of 63% (see Figure 11 below). While in countries such as Israel, Morocco and Lebanon, around 90% of the population uses the internet, the figure in Libya is only around 50%. In other countries, the corresponding figure ranges from 71% to 82%. Despite relatively high internet use, in certain countries affected by conflicts and severe economic crises such as Lebanon and Libya, internet access is severely limited by frequent electricity outages.

**Figure 11. Share of the population using the internet in 2021 (%)**



Source: World Bank n.d.g.

Note: data for Palestine is from 2020. Data for Libya was only available for 2014; thus, the data for 2022 was taken from Datareportal (2022) instead.

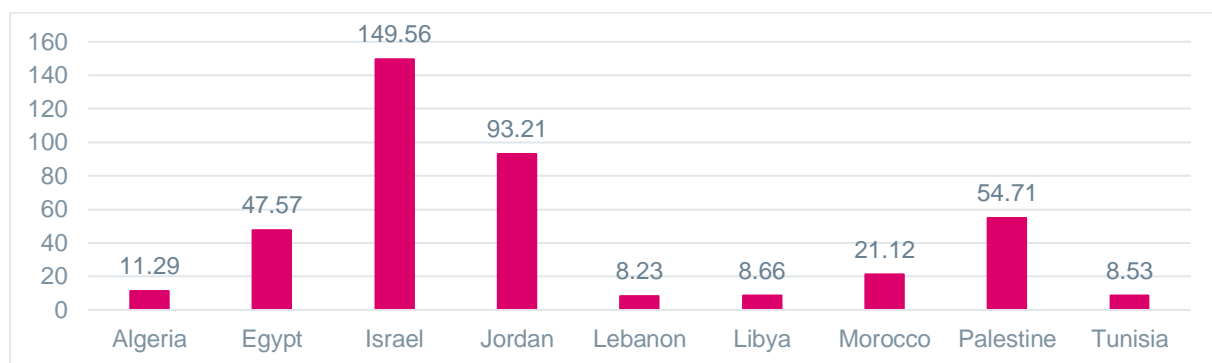
The region continues to face significant challenges with regard to digital inclusion among rural populations, resulting in **large urban-rural disparities in internet use**. Limited connectivity, lack of access to mobiles and laptops and limited digital literacy contribute to these disparities (PwC, n.d.). Despite such digital gaps, countries such as Egypt have made notable improvements over time. Egypt's overall score in the Roland Berger digital inclusion index increased to a record 60 in 2020, up from 52 in 2017, making it the third-biggest improver in the rankings. This progress was achieved by significantly improving internet coverage and ensuring its affordability.

Gender plays a crucial role in digital inclusion, with a **considerable gender gap** across the region. Women are significantly discouraged from embracing digital technology compared with their male counterparts. This gap is most pronounced in Morocco, where only 56% of women use the internet compared with 79% of men (PwC, n.d.).

Another **significant disparity exists between residents compared with immigrants and refugees, with the latter groups having much lower rates of internet access**. This trend is particularly visible in Jordan, where the government struggles to effectively extend digital services to a large population of refugees, many of whom are undocumented (PwC, n.d.).

**Despite high average internet use in the region, overall internet speeds remain fairly low**, with most of the countries ranked low in global internet speed rankings (Speedtest, 2023). However, significant disparities exist in internet speeds within the region (see figure below). Israel and Jordan boast relatively high internet speeds, ranking 17th and 45th globally, respectively. Egypt and Palestine find themselves around the middle of the global internet speed ranking, while the remaining countries are positioned at the very bottom.

**Figure 12. Median fixed broadband internet speed per country in June 2023 (Mbps)**



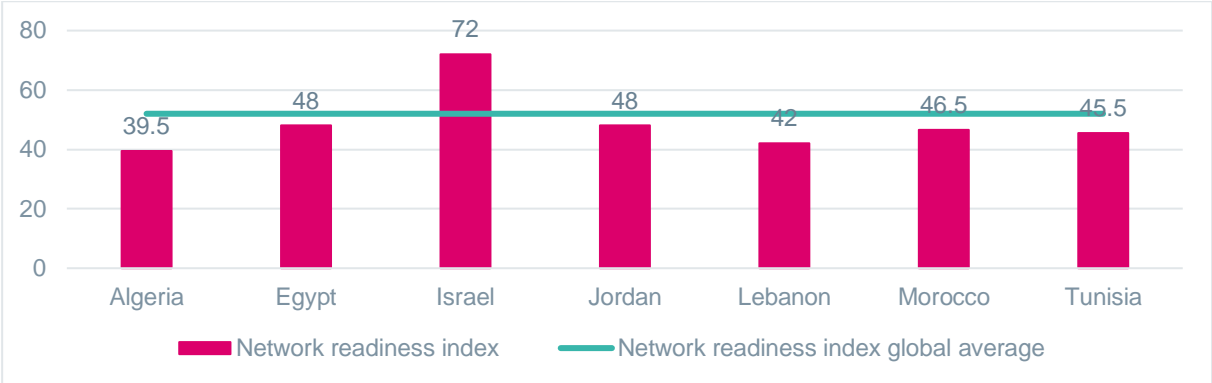
Source: Speedtest 2023.

**Most internet access in the region is based on mobile internet**, which has a penetration rate of around 50% (GSMA, 2023). However, **many people lack access to computers and to the fixed broadband connections** necessary to work from home. For example, a recent study in Jordan found that only around 17% of those surveyed had access to a laptop or desktop computer. Access was particularly low outside the capital city, Amman.

**The capacities to leverage ICT for social and economic development are unevenly distributed across the region**. According to the general NRI indicators for 2022<sup>7</sup>, most of the region performed below the global average, with the exception of Israel (see figure below). This indicates that region still needs to catch up in securing the capacities necessary to maximise the benefits of the digital economy.

<sup>7</sup> The Network Readiness Index (NRI) is an assessment tool used to measure and evaluate the general preparedness and capacity of countries to leverage information and communication technologies (ICTs) for economic and social development. The NRI is composed of a set of indicators that capture various aspects of ICT infrastructure, digital skills, regulatory environment, and the use of ICTs by individuals, businesses and government

**Figure 13. Network readiness index in the SEMED region in 2022**



Source: Network Readiness Index n.d.

While no conclusive data is available on digital skills in the region, **the shortage of digital human capital is evident**. The regional labour market has yet to address its acute digital skills shortage, which hinders its potential for further growth (Blom et al., 2020a). For example, a 2020 PwC survey of CEOs in the region highlighted the shortage of key digital skills as a major business threat (PwC, 2020). However, this digital skills shortage appears to be unevenly distributed across the region. Countries such as Egypt have a high percentage of people with at least basic digital skills (60%), while others such as Algeria and Tunisia lag significantly behind, with only a respective 16% and 21% of people having basic digital skills (Statista, 2019).

A key enabling factor for the development of the platform economy is the presence of **online banking services**. The leading global internet payment service PayPal is available in all countries in the region except Libya, Lebanon and Palestine, while TransferWise is only accessible in Egypt, Israel and Morocco (PayPal, n.d.; Wise, n.d.). Lack of payment services could negatively impact the development of the platform economy in the countries affected. A lack of suitable payment methods was often brought up as the most pressing challenge in focus group discussions with freelancers from Lebanon and Palestine. In addition to this, more freelancers cited high commission fees for bank transactions and currency exchange as an obstacle. In Palestine, e-banking is especially underdeveloped, as most of the economy is cash-based and informal, with only 5% of the population using bank cards (Ayyad, 2021).

Lastly, to enable the uptake of the platform economy, it is crucial that there is trust in digital services. However, research by PwC has also shown that **trust in digital services is particularly low in this region**, further hampering the penetration of digital technologies (PwC, n.d.). Lack of trust in digital services has been observed especially notably in Algeria and Tunisia.



## Chapter 2: Online work on and off digital platforms

Online work on digital platforms and online work outside of digital platforms are two different forms of online freelancing. Online freelancing is a new form of work that is characterised by independent remote work outside of an employment relationship, and which does not involve the commitment of a worker to a particular client in the long term. The difference between online work on platforms and off platforms is that in the former case, the work is mediated through digital platforms, while in the latter freelancers work directly for clients without platform mediation. Both of these forms of work differ from on-location platform work, as in both cases the work is completed online, independent of location. A more detailed conceptual clarification is provided in Annex 1. Conceptualisation of platform work and online freelancing.

### Prevalence of online work

**Work on digital platforms has been present in the SEMED region since at least 2009.** Among the first global platforms to enter the local market were oDesk (now [Upwork](#)) and [Freelancer](#). In addition, regional platform companies such as [TasmeemME](#) (established in Jordan in 2009), [Khamsat](#) (launched in Egypt in 2010), and [Fiverr](#) (established in Israel in 2010) were among the early regional players.

Numerous global platforms are actively used by freelancers in the SEMED region. **English-language platforms** such as [Upwork](#), [Freelancer](#), [Guru](#), [PeoplePerHour](#) and [Fiverr](#) are prevalent across the region. The presence of **French-language platforms** such as [404works](#) and [Missions freelance](#) has also been identified. However, what characterises this region most significantly is the presence of numerous **local and regional Arabic-language platforms**. Some examples include [Mostaq](#), [Elharefa](#), [Inploy](#), [Khamsat](#) and [Taskty](#) from Egypt, [Freehali](#) and [iKhedmah](#) from Algeria, [TasmeemME](#), [Kader](#) and [Tarjim](#) from Jordan, [Welink](#) and [Freelancer.ma](#) from Morocco, [Elancer](#) from Palestine, [B.O.T.](#) from Lebanon, and [Ureed](#) from the UAE.

However, according to research by the World Bank, the MENA region<sup>8</sup> has fewer local online labour platforms than other regions such as North America, Europe, South and East Asia (Datta et al., 2023). Only 3 to 4% of all platforms globally are headquartered in that region, and figures for the SEMED region are even smaller. Furthermore, global platforms account for a 70% share of platform use in the MENA region, while local platforms account for only 30%.

According to estimates from the World Bank, there are around 40 million registered online platform workers in the MENA region (Datta et al., 2023). This could mean that there are millions or even tens of millions of registered online workers in the SEMED region. However, this figure is only a rough mathematical estimate. Furthermore, the research concludes that only around one-third of all registered profiles globally could be active<sup>9</sup>. Still, this would mean that there could be millions of active workers in the SEMED region<sup>10</sup>. In contrast, our research into three targeted platforms, outlined further in this section, shows significantly lower activity rates.

<sup>8</sup> MENA refers to the Middle East and North Africa region, which is a broader region than SEMED. In addition to the SEMED countries, this World Bank study also includes the Gulf countries, Syria, Iraq and Iran.

<sup>9</sup> Active workers are those that have completed tasks on an online labour platform, while inactive users are those who have only registered profiles and no work history on these platforms.

<sup>10</sup> This research produced significantly higher estimates than previous studies because it included local and regional Arabic language platforms, and because projections were made on basis of those countries with the highest numbers of online workers in the region.

## Box 1. Data sources for online platform work

Gathering precise data about the prevalence of online platform work and freelancing proves challenging due to the difficulty of obtaining aggregated online data from different platforms and the absence of such data from national statistical registers. None of the governments in the region collect comprehensive statistics on online platform work. However, triangulating data can offer valuable insights into emerging trends.

To provide an overview of the features of online platform work in the SEMED region, as well as to compare the economies in this region with one another, we used two complementary data sources – both of which employ automatically collected data from digital platforms:

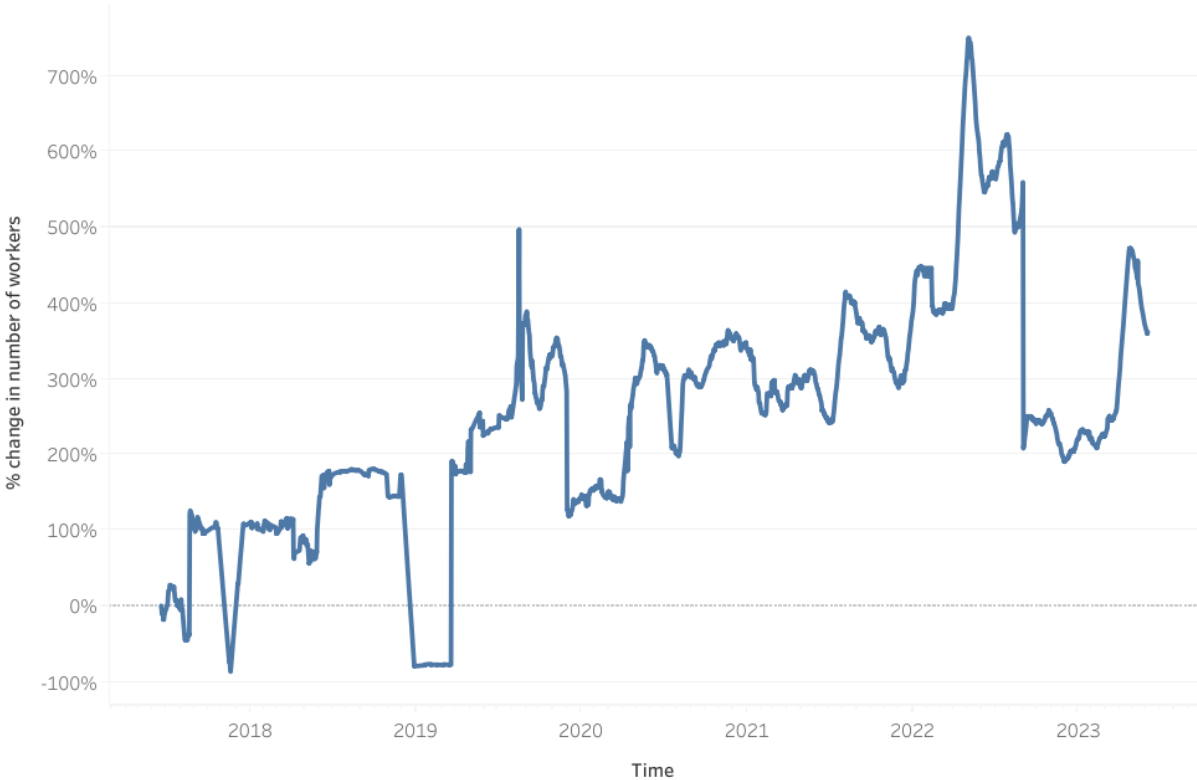
- **Data automatically collected for this specific study, as described in Annex 2.** This provides insights into the number of registered and active workers, worker occupations, gender gaps and pay for each of the SEMED countries. Data collection took place in March 2023, and consisted of web scraping data from online digital labour platforms. The data was collected from the profiles of registered platform workers on Freelancer.com, Guru.com and PeoplePerHour. The profiles scraped provide information on the number of registered and active workers on platforms, gender and hourly rates, as well as data unavailable in other sources such as the OLI. For more information, see Annex 2.
- The Online Labour Index (OLI) has been developed by the Oxford Internet Institute. The OLI dataset used provides longitudinal insights into changes in the number of active workers from nine SEMED economies from June 2017 until June 2023. This report also relies on an OLI dataset that contains the number of projects posted on the platforms from eight SEMED countries from July 2016 to June 2023 (with the exception of Libya). The OLI measures the supply and demand of online freelance labour across countries and occupations by tracking the number of projects and tasks across platforms in real-time. Its iLabour data on workers focuses on five major online labour platforms: Upwork, Fiverr, Freelancer.com, PeoplePerHour and MTurk. Each platform is sampled every day for each worker's home country, occupation category, and when they last completed a project. These samples are then weighted by the number of registered workers on each platform, to calculate the total number of currently active workers on all platforms. The datasets are shared publicly. A 'currently active' worker is anyone who has completed a project during the last 28 days.

Although the figures from the above two sources are not directly comparable, due to the different selection of digital labour platforms used, they complement each other to provide insights into the volume and regional distribution of platform work, as well as the occupational profiles of workers.

OLI data (see box above) suggests that total platform work activity in the SEMED region accounted for around **3.21% of the total global share** on major English language platforms in the period between 2017 and 2023 (Online Labour Observatory, 2020b). This means that SEMED freelancers account for 3.21% of the total cumulative number of workers active on these platforms per day during this six-year period<sup>11</sup>. Longitudinal data illustrates a **notable and steady growth in the activity of remote platform workers** over the same period (see figure below). This growth has been accompanied by frequent surges and drops in activity, indicating variable demand for online platform work. Notably, growth peaked at around a 750% increase compared with the baseline, at the end of 2022. However, this growth lasted only briefly and was followed by a significant drop in worker activity. This pattern of growth and fall roughly follows the global worker activity curve measured by the OLI, indicating that these shifts are likely to be caused by the changing global demand for online platform work.

<sup>11</sup> Active workers per day are added together for a six-year period, so the same workers are counted more than once. Thus, this figure does not represent an absolute number of workers, but rather a share of worker activity.

**Figure 14. Percentage change in the numbers of active workers in SEMED from 2017**

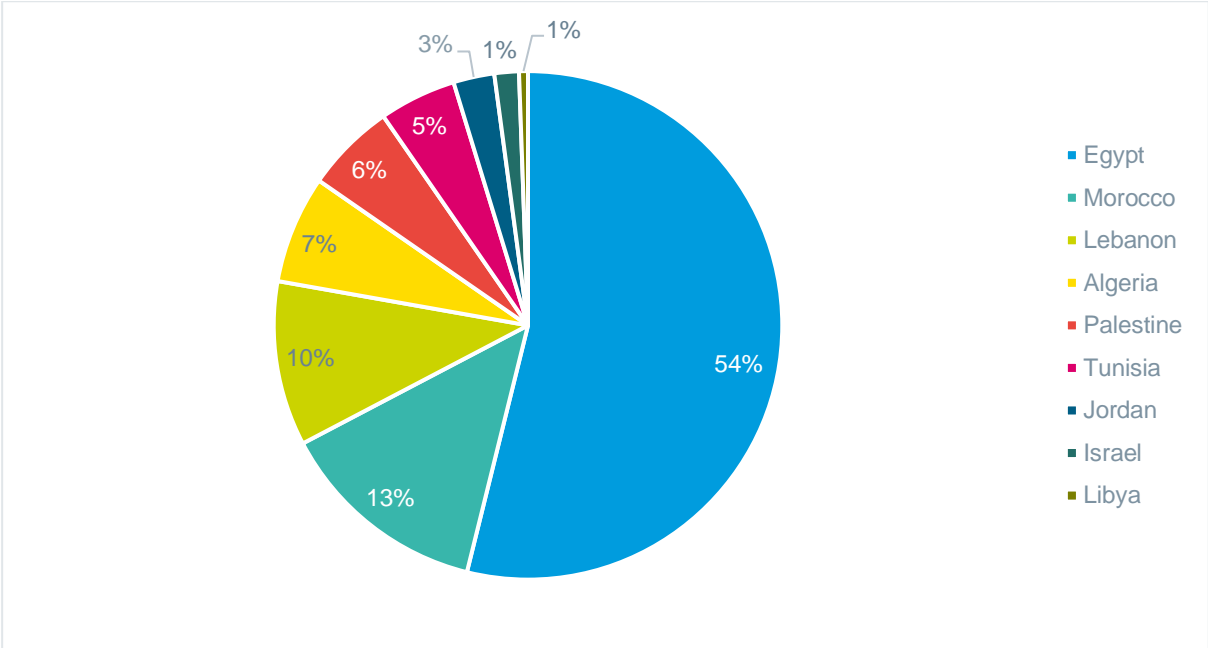


Source: Online Labour Observatory 2020b, accessed in June 2023.  
 Note: the numbers show a percentage change in the number of active platform workers per day from the starting date in spring 2017.

According to the OLI, there are **significant differences in platform work activity trends in individual countries**. While countries such as Algeria, Egypt, Jordan, Morocco, Palestine and Tunisia witnessed a growth in platform work activity during this period, the volume of active platform workers either dropped or remained stagnant in Israel, Lebanon and Libya.

**Most of the online platform work growth has been driven by online platform workers in Egypt**, as this country is the clear regional leader in terms of its absolute number of active platform workers. This can be explained by the fact that Egypt has a significantly higher and more economically active population than the other SEMED countries. According to OLI data, more than half of worker activity from the SEMED region on major global platforms comes from Egypt (see Figure 15). In June 2023, Egypt also had the 9th highest share of active freelancers in the world, accounting for a 1.74% share of freelancers globally during the six-year period measured (2017-2023).

**Figure 15. Distribution of worker activity per SEMED country from 2017 to 2023**



Source: Online Labour Observatory 2020b.

Note: this data does not indicate the number of workers. Instead, it shows the proportions of aggregate numbers of active workers per day for each individual SEMED country from spring 2017 to spring 2023.

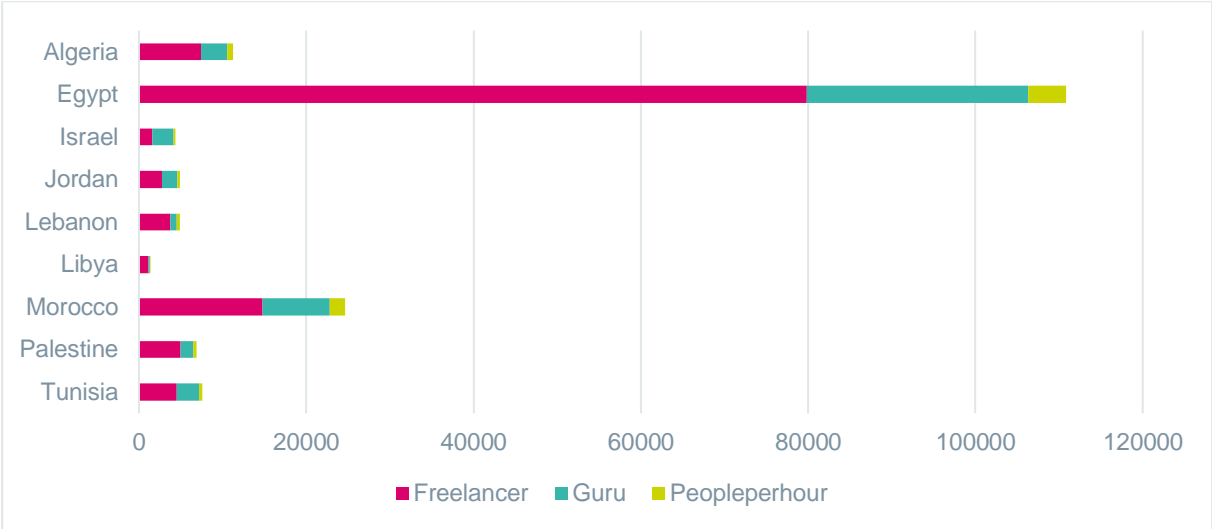
The analysis of automatically collected data carried out for this study shows the same trend. Egyptians were the most populous group of workers – both registered and active – on all three of the platforms analysed (Freelancer, Guru and PeoplePerHour), as illustrated in the figures below. In terms of **numbers of registered workers**, Egypt was followed by Morocco and Algeria, while Israel, Jordan, Lebanon, Palestine and Tunisia had comparable smaller figures. Libya is a clear outlier, with the smallest number of registered workers. The **distribution of active workers**<sup>12</sup> resembles these figures, with the major exception of Palestine, which boasts the third-largest number of active workers.

**The analysis presented in the rest of this report will be based only on active worker profiles.**

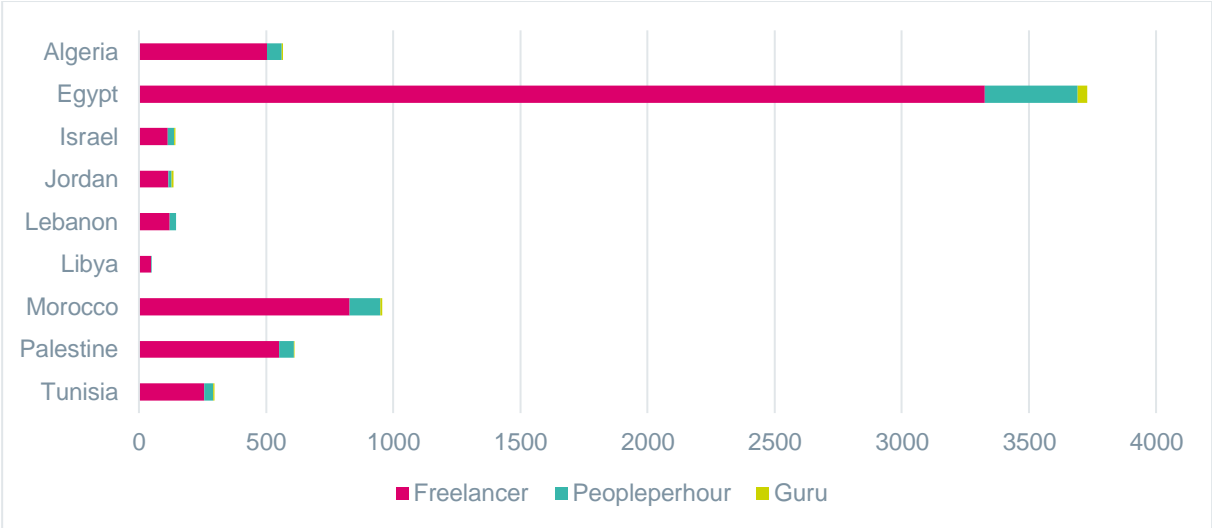
This is due to the high number of registered yet inactive profiles in the region. Only around 4.2% of all registered profiles in the region can be considered active. This low rate of activity can be explained by the general oversupply of labour on digital platforms, but also by the potential barriers to securing work faced by workers in the SEMED region in particular.

<sup>12</sup> Active workers are a sub-group of all registered workers that includes people who completed at least one task on the observed platforms. Often, the majority of registered workers on a platform have never completed any work.

**Figure 16. Numbers of registered worker accounts per country (March 2023)**



**Figure 17. Numbers of active worker accounts per country (March 2023)**

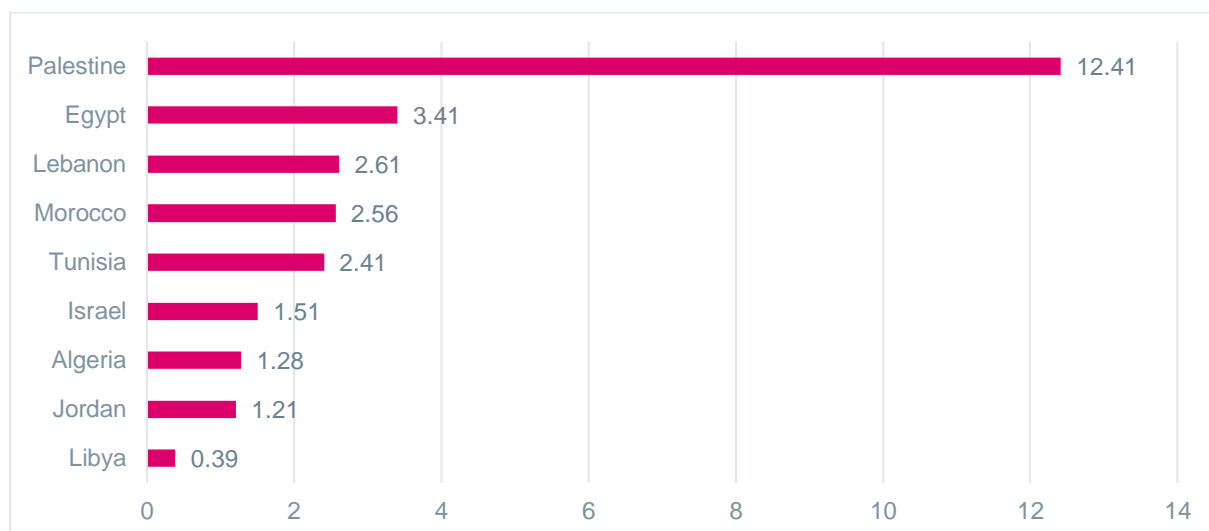


Source: data automatically collected from Freelancer, Guru and PeoplePerHour in March 2023 and prepared for the ETF.  
 Note: the actual number of workers could differ because the same person may have an account on multiple platforms, or some accounts may be used by more than one freelancer.

The absolute number of platform workers is not the best indicator for comparing the popularity of platform work between countries. This is because **SEMED economies have vastly different population sizes**, ranging from 109 million people in Egypt to fewer than 5 million in Palestine (World Bank, n.d.h).

Looking at the number of **active worker profiles per capita** can provide a better picture of the relevance of platform work in individual SEMED countries. The figure below shows that Palestine is the absolute leader in terms of the number of active online platform workers per capita, with more than three times more workers per capita than second-ranked Egypt. The explanation for such a high number of Palestinian workers may lie (among other reasons) in a lack of other available employment opportunities. For example, previous research shows that employment opportunities for ICT graduates in Palestine are extremely low domestically, which is why they opt for freelancing on global platforms (World Bank, 2021). The process of finding work might also have been aided by important programmes supporting online platform work. The figures for Libya are the lowest in the region.

**Figure 18. Numbers of active worker accounts per 100 000 inhabitants (March 2023)**



Source: data automatically collected from Freelancer, Guru and PeoplePerHour in March 2023.

Notably, **the number of platform workers per capita identified in the region is significantly lower than in previous studies on the Western Balkans and Eastern Partnership countries** (ETF, 2022a). While in these regions the number of active online platform workers per 100 000 people stood at around 23 and 14, respectively, the corresponding figure for SEMED is only 2.76<sup>13</sup>.

**There is also an uneven spatial distribution of online platform workers in SEMED countries.**

According to World Bank research, around 45% of workers in the region are concentrated in the capital cities only (Datta et al., 2023). In Egypt, a staggering 57% of workers are based in the country's capital, Cairo. The concentration is much lower in Morocco, where only 28% of workers are based in Rabat, with an additional 46% in other large cities. In Tunisia, only 15% of workers are located in the capital, Tunis, while the rest are spread out in smaller cities and villages. The general finding of this study is that workers tend to be spread out more in the countries where there are higher levels of internet access, greater levels of rural electrification and higher income per capita.

The platforms analysed in depth for this study represent only a fraction of the platforms used in the SEMED region. The table below provides **the numbers of registered workers per country on the platforms that were identified as most popular in SEMED** as of April 2023. Although Arabic-language platforms are present in the SEMED region, it appears that English-language platforms such as Freelancer, Upwork and Guru are used by more workers in the region.

<sup>13</sup> Although the selection of platforms does not in any way reflect the absolute numbers of platform workers, the number is indicative of the relatively low penetration of platform work in the region. It is also important to note that one of the platforms analysed is different in the research on Eastern Partnership countries, and that these measurements occurred at different points in time. Still, as the number of active workers has generally grown over time, this time difference might indicate an even more significant disparity in the progress of the SEMED region.



**Table 1. Remote work platforms popular in SEMED countries**

Platform	DZ	EG	IL	JO	LB	LY	MA	PS	TN
<b>Approximate numbers of registered worker accounts</b>									
Freelancer	7,408	79,872	1,608	2,750	3,763	1,156	14,740	4,997	4,502
Guru	3,137	26,458	2,552	1,860	760	172	8,038	1,484	2,678
PeoplePerHour	697	4,505	202	287	386	48	1,905	422	421
Shoghlonline*	258	3,375	/	321	63	27	261	603	57
Ureed*	110	2,681	/	503	186	/	124	149	59
Dribble	207	1,040	306	61	35	5	483	52	102
Hubstaff Talent	126	776	180	71	128	11	283	56	175
<b>Number of reviews*</b>									
Upwork*	4,946	46,863	4,874	1,533	3,176	/	8,834	10,172	6,507
Freelancer	5,831	50,990	779	1,213	2,244	397	10,553	7,212	5,497

Source: platform websites, reviewed by PPMI in March 2023.

\* Based on the findings of desk research, platform workers in the SEMED region are active on a larger number of platforms. However, some platforms do not provide an exact number of workers. Notable examples are the Arabic-language platforms Mostaqil and TasmeemMe, but also the Israeli English-language platform Fiverr.

\*\* Shoghlonline and Ureed are Arabic-language platforms, while the rest of the platforms above are in the English language.

\*\*\* Number of reviews represents the number of client feedbacks received by platform workers, and serves as a proxy measure for the number of tasks completed on the platform. Upwork does not provide information on the number of registered workers, so the only the number of reviews is shown for this platform.

In previous research on the Western Balkans and Eastern Partnership countries, Upwork was by far the most widely used platform (ETF, 2022a; ETF, 2021b). Although the number of online platform workers is not available on the Upwork website, we were able to compare the numbers of client reviews for Upwork and Freelancer. Notably, this comparison indicates that freelancers from the SEMED region completed a similar number of tasks on each of these platforms. Upwork, with 86 905 reviews, is only marginally ahead of Freelancer in popularity, which has 85 143 reviews. In terms of registered freelancers, Freelancer is the most popular platform with 120 796 freelancers registered, while Guru is in second place with 47 139.

### **Freelancers in the SEMED region find online and platform work through various channels.**

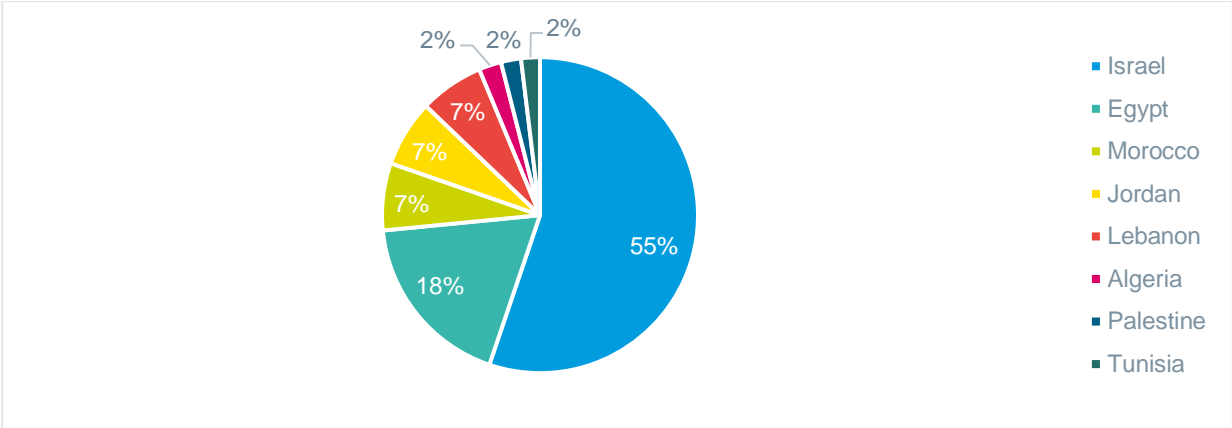
These include online ads, professional social media groups, but also personal connections. In the case of online off-platform work, job opportunities may be announced on social media sites such as Facebook (through groups such as Freelancer Maghreb Countries<sup>14</sup>) or LinkedIn, as well as job boards/recruitment platforms such as Wuzzuf. Still, word of mouth, occupational groups and recommendations from previous clients are also fairly frequent methods for finding work.

Lastly, to better understand the dynamics of platform work in the region, it is useful to look at **where the demand for platform work comes from**. While Israel has among the lowest numbers of platform workers in the region, 55% of all global platform tasks posted from the region come from this country (see figure below). This aligns with OLI global data, which shows that most **demand for platform**

<sup>14</sup> Freelancer Maghreb countries: <https://www.facebook.com/groups/2956117777984257/>

**work comes from more developed economies, while most work is performed in less developed economies** (Online Labour Observatory, 2020a; Datta et al, 2023). The low level of participation in platform work in Israel may be attributed to the lack of a strong economic incentive to engage with digital platforms, as the compensation available in online labour markets is not sufficiently higher than local wages, and this type of work is accompanied by significant levels of precarity (this is discussed in greater detail in the Working conditions section). At the same time, platforms may provide significant opportunities for Israeli entrepreneurs – i.e. service buyers – to find affordable on-demand labour in lower-income countries.

**Figure 19. Shares of global platform labour demand coming from the SEMED region from 2016**



Source: OLI.  
 Note: the percentages above show the proportion of all global platform tasks posted by clients from the SEMED region. Data was only available for the period from December 2016 to December 2022, and no data was available on Libya, due to the absence of platform tasks coming from this country.

### Attractiveness of online work

The attractiveness of online work on and off digital platforms is mixed. On the one hand, workers choose this type of work due to the possibility of earning a higher income, for flexibility and skills development, or due to a lack of other employment opportunities, particularly for refugees. On the other hand, some workers are prevented from freelancing online due a lack of digital infrastructure, the absence of international payment systems in their country and high entry barriers to this type of work. Others, meanwhile, may avoid it due to the likelihood of poor working conditions and a lack of security.

Our research has identified several major factors that motivate a worker’s decision to engage in online work on or off digital platforms. These include **pull factors such as higher income, flexibility and skills development**, and the **push factor of a lack of other employment opportunities**.

One of the most frequently cited reasons why workers from the SEMED region engage in online freelancing on or off digital platforms is the possibility of earning a higher income than through jobs on the local labour market. In focus groups, the possibility to secure a higher income was identified as the most common motivation for joining online labour platforms. For some freelancers, this is their primary source of income, while for others it supplements their regular salaries. Not only can freelancers from the SEMED region earn more through freelancing than they can on local labour markets, but there are also no wage caps, which means that they can set their own rates. Importantly, workers are motivated by the possibility of getting paid in US dollars, which is especially important in countries with a weakening local currency such as Egypt. Similarly, freelancers in the SEMED region tend to prefer English-language platforms over Arabic-language platforms due the higher pay on offer. However, the entry barriers to English-language platforms are much higher, which is why freelancers often start by working on local platforms. For example, novice freelancers in Egypt tend to use less competitive regional platforms such as Khamsat to build their portfolios. After this, they may upscale by joining highly competitive global platforms such as Upwork. A survey conducted among Tunisian freelancers

revealed that they mostly prefer to work for French, American and Canadian clients due to a higher remuneration than that offered by regional clients. However, 43% of the freelancers surveyed still work for local clients, 38% for foreign clients, and 19% for both (Open Startup International, 2021).

**Flexibility** was frequently cited in focus groups as a primary motivation for individuals choosing to work as online freelancers. These workers value both **locational and temporal flexibility**. Locational flexibility allows freelancers to work from any location, making it particularly appealing for those with caring responsibilities, especially women, who can work conveniently from home<sup>15</sup>. Some female focus group participants also highlighted the high **incidence of harassment of women** in physical workplaces, which can be avoided with online jobs. Moreover, online freelancing in principle expands opportunities to work from rural areas and outside major cities. Temporal flexibility grants workers the ability to determine their own working hours and establish a healthier work-life balance. This autonomy over their schedules allows freelancers to better manage their personal and professional commitments, creating a more harmonious and satisfying work experience. Focus groups indicated that this type of flexibility was particularly beneficial for students, but also provided feelings of independence and freedom to workers in general.

Another finding from the focus groups with online platform workers was that some also engage in this type of work in order to **further develop their skills**, such as software development, and to **boost their professional portfolios** with projects for international clients. This is especially the case among those at the start of their careers. Others indicated that they wished to develop soft skills such as improving their knowledge of the English language and communication skills.

Online freelancing can also be **an attractive option in cases where other employment opportunities are scarce**. During times of high unemployment or crises such as the COVID-19 pandemic, online freelancing can provide a temporary income. In Palestine, for instance, online freelancing has provided a lifeline during periods of complete work deprivation (UNDP, 2018). With limited freedom of movement and few opportunities in the local labour market, online platforms offer access to a virtual job market, sustaining the livelihoods of many Palestinians. Often, work is delegated to them by other Palestinians through diasporic networks. The significance of online freelancing in the Palestinian context has led to the development of support programmes such as Gaza Sky Geeks and Freelancing Academy, aimed at honing the skills necessary for online freelancing (Quinn, 2017). These programmes have helped to train young people in skills relevant for online freelancers, such as coding, design and translation (Saliola and Cunningham, n.d.). These programmes mainly target young people in Gaza, who are in a particularly vulnerable position in the labour market. In general, online freelancing is seen as an alternative to the stagnant local economy, marked by high unemployment in this Palestinian enclave, and an opportunity to create new higher-skilled jobs. Focus groups indicate a similar trend in Lebanon, where online platform work is seen as one of the strategies to overcome an extremely harsh local economic situation. Primarily, freelancers use online platform work to gain access to foreign currency amid the sharp devaluation of the local currency.

Another advantage of online freelancing is that it can create employment opportunities for those who do not have access to regular labour markets, including the numerous **refugees in the region**. For example, in Jordan and Lebanon, informal online work is considered a safe form of employment for Syrian UNHCR-registered refugees, as they have very limited access to formal work (International Rescue Committee, 2016). Furthermore, by dividing work into smaller tasks, platforms provide opportunities for workers with varying degrees of potential time to which they can commit. They also potentially enforce a less discriminative work environment through algorithmic management and increase access to work for this marginalised group. However, these opportunities for refugees are often constrained by inadequate or non-existent hardware and internet connectivity and the necessary skills to undertake this type of work (ILO, 2023).

Apart from these general factors that motivate workers in the SEMED region to turn to online platforms, the research has identified four important **barriers that hamper further participation in**

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<sup>15</sup> Supported by evidence from focus group discussions.

**online labour markets.** These barriers include a **lack of adequate digital infrastructure, problems with international payments, high entry barriers, and high levels of precarity and insecurity.**

One of the most frequently cited barriers to online work is the **lack of adequate digital infrastructure.** As indicated in the previous section, access to high-speed broadband internet is often lacking in this region, particularly in rural areas. For example, in Lebanon, unstable internet connections are coupled with frequent power blackouts, rendering online platform work extremely difficult. Thus, many workers in the region cannot engage in online work requiring a stable internet connection. However, some platforms, such as Elharefa in Egypt, have developed coworking spaces to help onboard people who have limited internet connectivity at home (Datta et al., 2023).

Furthermore, many online workers in the region are unable to access **international payment services** such as PayPal and Wise (Neaime and Gaysset, 2018). This is the case in Algeria, Libya and Palestine. The situation in Palestine is particularly dire, with only around 25% of the population having access even to regular banking services, and some international payment services do not recognise Palestine as an eligible country (Economic Research Forum, 2021). In Lebanon, meanwhile, due to a rampant economic crisis, withdrawing money from banks has also become an issue. Problems with international payments were also highlighted by focus group participants as one of the main barriers to online platform work.

**High entry barriers** to online labour markets often prevent workers from the SEMED region from engaging in work on online labour platforms. Due to a high level of competition for a limited number of jobs, especially on global platforms, it is difficult for online freelancers to obtain work on these platforms without advanced skills and significant work experience. Our findings show that this is due to a lack of the technical skills needed for the work, but also a lack of soft skills such as self-branding and negotiation. This is particularly true in the case of platforms with rigorous screening and selection process such as Toptal.

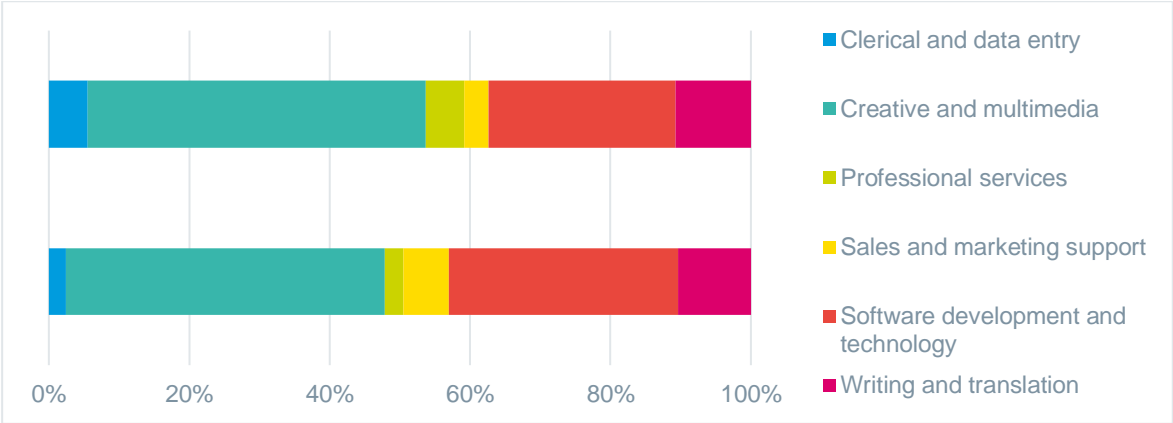
**High levels of precarity and insecurity** may also dissuade workers from engaging in online platform work. The precarity comes from an unstable income and the high amount of unpaid work that may be required. Online freelancers are also afraid of predatory behaviour and fraud that may be carried out by clients on online platforms. Lastly, due to the lack of a clear legal status in most SEMED countries, freelancers are not protected by labour laws. Where they work informally, they do not benefit from any legal or social protection.

## Occupations and profiles of workers

Automated data collection provides information on the profiles of platform workers in the SEMED region in terms of their occupation, gender and pay rates.

The two sources on remote platform work analysed in this report – data collected for this research and the OLI – indicate similar distributions of occupations among remote platform workers in the SEMED region (see figure below). According to both sources, **creative and multimedia is the most frequent occupation, followed by software development and technology, and writing and translation.** The sources differ when it comes to the order of the remaining three occupational categories, although their frequencies are similar. The sources also differ somewhat with regard to the proportions of creative and multimedia and software development and technology occupations. These differences may result from the differing selection of platforms used (see above) and differences in the methodology used for data collection (for example, the OLI uses weighted sample data to provide estimates, while the data for this study was collected on the whole target population of workers). Nevertheless, the two data sources mostly overlap and lead to similar conclusions. In comparison with the Western Balkans and Eastern Partnership countries, the SEMED region is characterised by a lower share of workers in the field of software development and technology, and a higher share working in creative and multimedia (ETF, 2022b; ETF, 2021c).

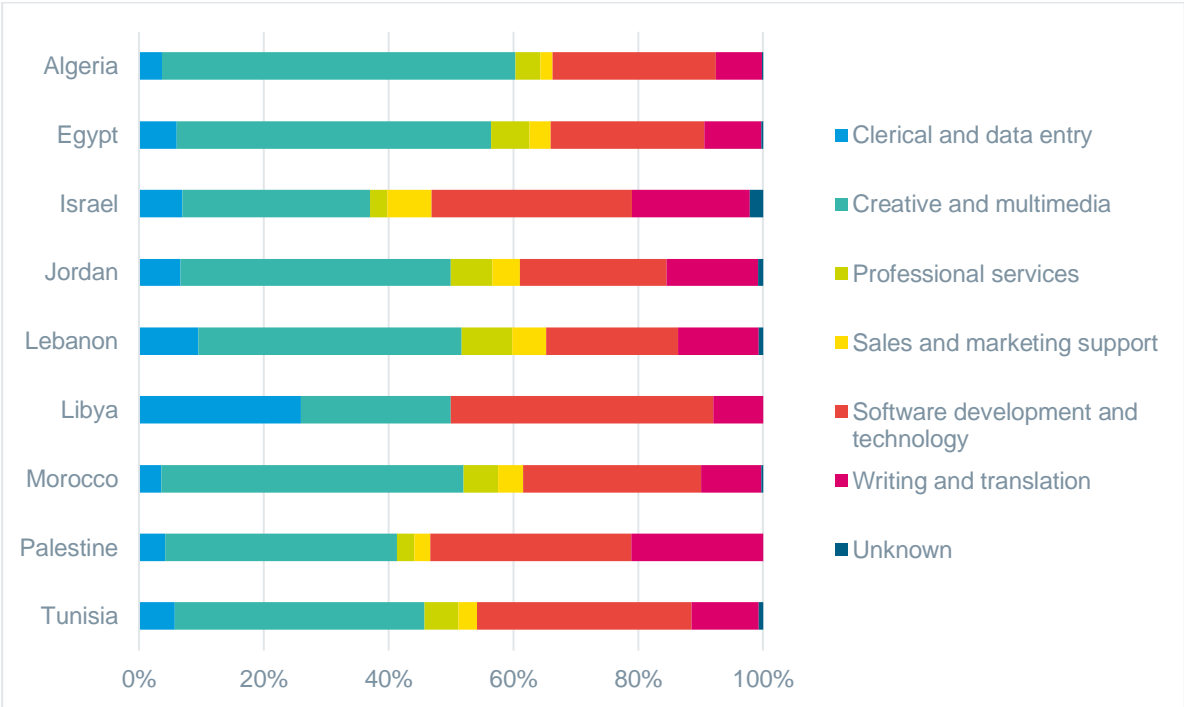
**Figure 20. Occupations of active workers in the SEMED region**



Source: first row, data automatically collected from Freelancer, Guru and PeoplePerHour in March 2023 and analysed for the ETF; second row: OLI.

**The distribution of occupations in individual countries remains similar** (see figure below). Notable exceptions are a higher number of freelancers working in the areas of software development and technology and writing and translation in Israel and Palestine. In addition, Libya has higher proportions of freelancers in clerical work and data entry, as well as in software development and technology.

**Figure 21. Occupations of active workers by country (March 2023)**

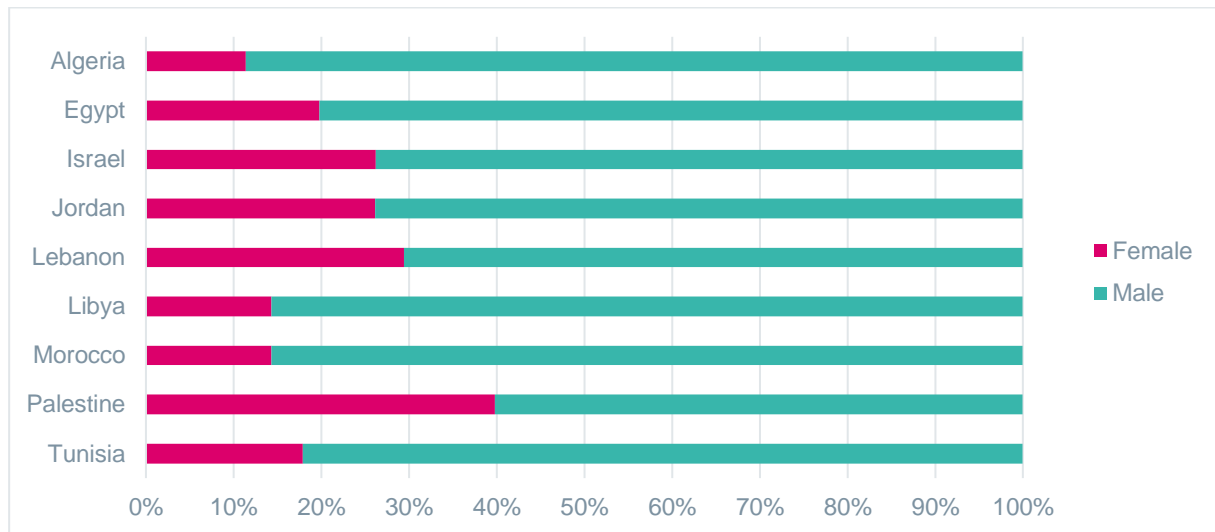


Source: data automatically collected from Freelancer, Guru and PeoplePerHour in March 2023.

Furthermore, **the gender divide in remote platform work in the SEMED region is quite pronounced**. The data collected for this study shows the overrepresentation of men on platforms across all nine SEMED economies. The proportion of male freelancers ranges from 60% in Palestine to almost 90% in Algeria (see Figure 22 below), averaging 80% across the entire region. Notably, more women work on online labour markets in the Levant region than in North African countries. The share of men in platform work is higher than in countries in the Eastern Partnership and the Western

Balkans, although gender imbalances were also pronounced in those regions too (see ETF 2021c, ETF 2022b)<sup>16</sup>.

**Figure 22. Gender of active workers by country (March 2023)<sup>17</sup>**



Source: data automatically collected from Freelancer, Guru and PeoplePerHour in March 2023.

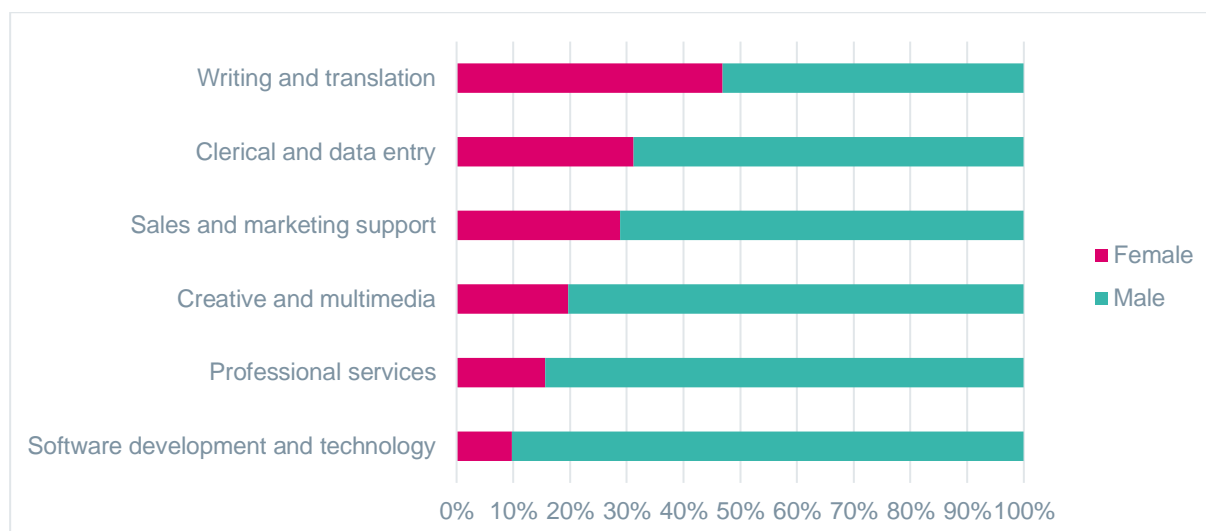
As in the EU, Eastern Partnership and Western Balkan countries, the occupational choices of platform workers in the SEMED region vary by gender. Among workers in the SEMED region, writing and translation work is the only occupation in which women and men engage equally. Meanwhile, software development and technology work is strongly dominated by men, with only around 10% of workers in this occupation being women (see figure below). This distribution reflects the same occupational segregation observed in the offline labour market, whereby men tend to occupy higher-skilled and higher-paid tasks (Datta et al., 2023).

<sup>16</sup> These results contradict the findings of World Bank research which reported a staggering 56% of workers on online labour markets in the MENA region being women. This compares with only 18% women in the services sector. The same research found 28% of platform workers in Tunisia were women, which is closer to our findings. These results might differ due to a different selection of platforms, methodology and regional coverage in the two studies.

<sup>17</sup> Gender could not be identified for many worker profiles (around 14%). This was due to the difficulty of constructing an algorithm that could separate male names from female names, but also due to the large number of nicknames and agency profiles used (for more information on this, consult [Annex 2](#)). The proportion of profiles with an unidentified gender was highest in Algeria, at around 30%.



**Figure 23. Gender of active workers by occupation (March 2023)**



Source: data automatically collected from Freelancer, Guru and PeoplePerHour in March 2023.

Note: profiles whose gender was unidentified were excluded from this analysis.

The platforms analysed for this research do not provide data on the age of online platform workers. However, country-level research indicates that **online platform workers in all SEMED countries are overwhelmingly young**. For example, an ILO survey in Jordan indicates that around three-quarters of all online platform workers in the country are under 35 years of age (ILO, 2023). According to research by the World Bank, around 63% of online platform workers in Tunisia are below 30 years of age, and an additional 28% are aged between 30 and 44 years (Datta et al., 2023). The same research found that around 80% of all online platform workers in the MENA region are below 30 years of age, which is more than three times higher than the figure for the offline services sector. Another survey in Tunisia confirms this trend, with half of the surveyed freelancers being in the 18-24 age range and 88% in the 18-34 age range (Open Startup International, 2021).

Finally, there is insufficient data on the **hours worked** by online workers in the region. However, it appears that workers are engaging with platforms **mostly on a part-time basis**. A survey conducted by the ILO in Jordan in 2021 among active digital labour platform workers found that while around 22% of online platform workers worked full-time, more than half of them (56%) worked fewer hours, or part-time (ILO, 2023).

## Working conditions

Automated data collection, national fieldwork and desk research indicate that **working conditions on online platforms in the SEMED region are mixed**. While online platform work can provide significant earning opportunities for some workers, for the majority this income tends to be irregular. It is also crucial to acknowledge that this type of work is marked by a considerable degree of legal insecurity and a lack of social protection.

When it comes to income from online platform work, the data scraped from platforms in 2023 shows **that the average hourly rate requested by freelancers in the SEMED region is USD 17.22**. This rate is notably lower than average rates in the EU, which exceed USD 20, but higher than those in the Western Balkan countries, which stood at around USD 14 (European Commission, 2021a)<sup>18</sup>.

**The average hourly rates requested on online labour platforms also differ significantly within the SEMED region** (see Table 2 below). They range from around USD 16 in Egypt to USD 28 in

<sup>18</sup> It is important to note that this data is from different years, and that comparisons may not only reflect differences between regions, but also changes in the market.



Israel. Notably, the comparison between average hourly rates in local labour markets and on digital platforms shows that **platform work offers significantly better income opportunities in countries with lower local wages**. For example, while the average hourly platform rate is lowest in Egypt, this is still 1,759% higher than the local average hourly wage. In contrast, in Israel, the country with the highest platform rates, this difference is only 74%<sup>19</sup>. The finding that online digital platforms may provide significantly higher incomes to workers in less developed economies is in line with existing research (Lehdonvirta et al., 2018).

However, it is important to note that comparisons between hourly platform rates and wage income should be made very carefully. The hourly rates of freelancers also need to take into account the unpaid time spent securing tasks **Error! Not a valid bookmark self-reference.** and the extremely irregular nature of platform work. In addition, these figures represent only the rates requested on workers' profiles, not what they actually earn. Lastly, only a small number of freelancers manage to secure any work, as shown in this report. Thus, these figures should be read primarily in terms of opportunities for high hourly rates for a limited number of workers in the region.

**Table 2. Average monthly salary in SEMED countries (after tax)**

Country	Average monthly salary (USD)	Estimated average hourly rate (USD)	Average hourly rate requested by remote platform workers (USD)	Difference between the average hourly rate on platforms and the local labour market (%)
Algeria	266	1.66	17.03	+924%
Egypt	138	0.86	16.03	+1,759%
Israel	2,586	16.16	28.07	+74%
Jordan	629	3.93	20.96	+433%
Lebanon	507	3.17	21.93	+592%
Libya	271	1.69	19.43	+1,047%
Morocco	391	2.44	18.28	+648%
Palestine	666	4.16	16.64	+300%
Tunisia	293	1.83	21.49	+1,074%

Source: Numbeo, March 2023 and data automatically collected from Freelancers, Guru and PeoplePerHour for this study. Note: the Numbeo data refers to average net salaries, and estimates of the hourly rate based on these assume 40 working hours per week, 4 weeks per month. It is important to note that this data comes from a private website for which reliable data collection procedures cannot be ensured. However, to our knowledge, there is no comprehensive and reliable dataset on average wages in the region.

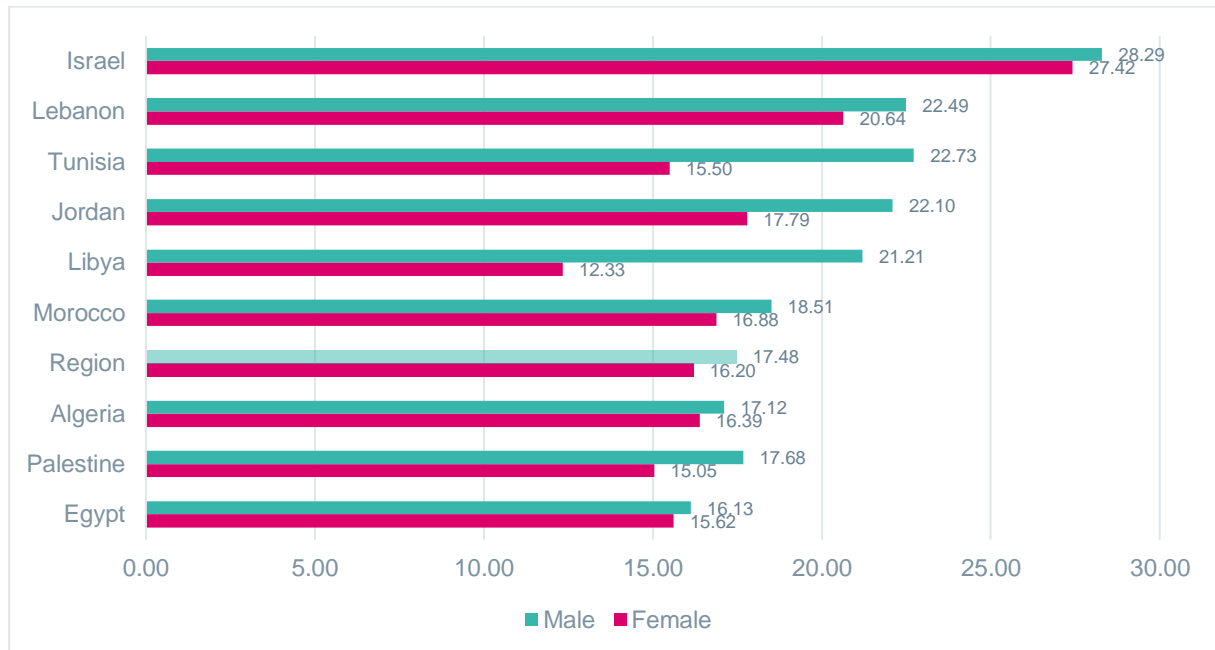
**Income from platforms varies depending on the specific platform used.** According to interviews with freelancers, platforms such as Upwork<sup>20</sup> offer considerably higher wages than Arabic-language platforms such as Khamsat. As a result, many freelancers from the region initially work on local platforms to build up their portfolio, and later transition to using global platforms that offer higher hourly rates.

<sup>19</sup> Note that the data is taken from the Numbeo website, which may not accurately reflect average wages in these countries.

<sup>20</sup> Upwork is not included in the data obtained by web scraping.

In addition, there is a **noticeable gender gap in demands for requested hourly rates across all countries in the SEMED region** (see figure below). Men tend to demand higher hourly rates than women. This gender disparity is particularly significant in certain countries, such as Libya and Tunisia.

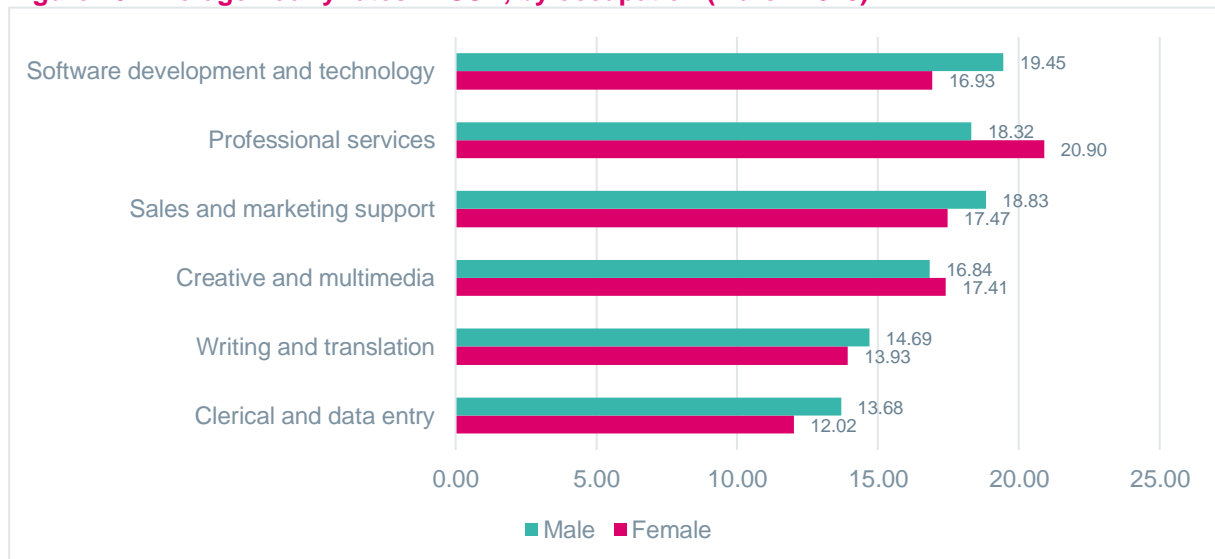
**Figure 24. Average hourly rate by country and gender, in USD (March 2023)**



Source: data automatically collected from Freelancer, Guru and PeoplePerHour in March 2023

At least in part, this **gender income gap is related to occupational differences between men and women**. For example, writing and translation work and clerical and data entry occupations, which are more popular among women, are the two lowest-paid occupations analysed in the SEMED region. On the other hand, male-dominated software development and technology is the highest-paid profession (see Figure 25 below). Thus, women primarily earn less on platforms due to a lack of skills in well-paid occupations, such as software development. In this regard, online platform workers in the SEMED region do not diverge from global trends (Datta et al., 2023).

**Figure 25. Average hourly rates in USD, by occupation (March 2023)**



Source: data automatically collected from Freelancer, Guru and PeoplePerHour in March 2023

It is crucial not to equate hourly platform rates with hourly wages in regular employment, due to the **irregular nature of income on platforms**. Most online platform workers do not manage to secure enough tasks to rely on platform work as their main source of income. For instance, a survey conducted in Israel revealed that more than 40% of workers on Fiverr in Israel earned less than USD 100 during the nine-month study period (Nathanson et al., 2023). Only 0.4% of workers received revenues of over USD 50 000, with an even smaller percentage earning between USD 10 000 and 50 000. An ILO survey in Jordan shows that more than half of platform workers in the country earned less than minimum wage over a period of 6 months. Similarly, a World Bank survey indicated that 69% of microworkers<sup>21</sup> in Algeria reported that they are regularly unable to make ends meet, and only 6% manage to put away any savings from this kind of work. In Morocco, the figures are slightly better, with 44% of workers struggling on platform earnings, and 11% managing to build up savings. These findings indirectly suggest that work on online platforms is not the primary source of income for the vast majority of platform users. Focus group discussions also indicate that most online platform workers cannot find enough work on platforms and they mostly treat it as a temporary or side-job. However, we do not have conclusive quantitative evidence with regard to this phenomenon.

Focus groups also highlighted **international payment issues as significantly reducing their income**. This may be due to the unavailability of online payment services, high bank transaction fees and conversion rates.

Country-level research indicates that online platform workers in the SEMED region have **limited access to social protection** due to their legal status as self-employed or informal workers. **Self-employed workers** enjoy some basic protection such as medical insurance, but they **lack crucial employment benefits** such as paid sick leave, maternity or paternity leave, and legal protection from clients or platforms. In the event of disputes arising with clients of platform companies, freelancers' access to platforms can be easily restricted. In addition, platform workers often lack the means necessary to pursue appropriate legal mechanisms in order to defend their rights. **Managing their own legal affairs**, including tax payments and contributions, adds to the challenges faced by self-employed freelancers. In certain countries such as Jordan, the cost of social protection for the self-employed is relatively high, thus discouraging socially disadvantaged workers from seeking such protection (MoDEE, 2019).

Freelancers often resort to **informal work without contracts**. This lack of formality with regard to employment leaves them **without access to social and legal safety nets, including medical insurance and retirement schemes**, making their situation even more precarious than that of self-employed workers. ILO research indicates that in Jordan, 55% of platform workers surveyed did not have health insurance coverage. Of those that had health insurance, the majority were covered through their full-time employment with other companies (ILO, 2023). Research by the World Bank also shows that 75% of microworkers in Algeria and 69% in Morocco do not have health insurance (Datta et al., 2023). The same research shows that two-thirds of microworkers in Algeria also do not have access to pension or retirement schemes. When asked about what types of work benefits they would like to receive from platforms, online platform workers in Egypt, Lebanon, Morocco and Tunisia mostly cited healthcare and pension, but also loans to buy work equipment (Datta et al., 2023).

Not only are local legal frameworks often inadequate with regard to platform work agreements, but the lack of alignment between jurisdictions renders legal actions complex and expensive, and their outcomes uncertain. This leaves workers **highly susceptible to exploitation, wage theft and scams**. In the case of refugees, these risks are exacerbated, given that their residence status is not always clear and any contact with law enforcement is rife with risks. Desperate circumstances and a lack of alternatives may make these workers especially susceptible to online exploitation (ILO, 2023).

Although many workers opt for online platform work due to **flexibility regarding the place and time of work**, this flexibility often **comes with precarity**. Freelancers do a lot of unpaid work while searching for jobs, identifying appropriate clients, applying for jobs, interviewing and, especially, building portfolios and maintaining a good reputation. Sometimes it is necessary to submit to unfair

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<sup>21</sup> Online platform workers working on fragmented micro-tasks, such as those provided by Amazon MTurk.

client requests and work for free in order to maintain one's reputation. This might translate into spending long periods of time without income, but also into a disrupted work-life balance. Focus groups with online platform workers from the SEMED countries indicate that the biggest downside of platform work for them is the difficulty of obtaining jobs, despite constantly applying for them.

With respect to **working hours**, these are usually lower than in traditional employment, primarily due to the limited availability of work. In research conducted in Jordan, platform workers reported working fewer hours on average than traditional workers (ILO, 2023). Specifically, 31.8% of platform workers reported working fewer than 24 hours per week compared with 15.8% of traditional workers. In contrast, 67.3% of traditional workers worked 40 hours or more in a typical week, compared with half of platform workers.

Despite poor working conditions and unfavourable legal frameworks governing their work, online workers **rarely engage in collective struggle** to improve their work conditions. An exception to this is the Tunisian Freelancers COOP<sup>22</sup>, a cooperative of freelancers founded in 2019. The aim of the cooperative is to help its members with various issues relating to their work, but also to exert pressure collectively on the government for an official recognition of their work status. However, an expert interview with an ILO representative in Tunisia indicated that this cooperative is still unable to put sufficient pressure on the government to meet their demands.

## Workers' skills

In general, to work on online labour platforms, certain essential skills are necessary. **Self-regulated learning, digital skills and knowledge in various professional domains are crucial for individuals seeking to engage in online employment** (Lehndonvirta and Albert, 2020).

Platforms generally do not provide structured data regarding the education of the freelancers who work on them. Despite varying education levels, **most online platform workers in the region are highly educated**. An ILO survey in Jordan indicates that, on average, online platform workers have higher levels of education than those in regular employment in the same sectors: 87% in contrast with 68% (ILO, 2023). Research in Palestine has indicated that 53% of Palestinian freelancers have a Bachelor's degree, while 13% of them have a Master's degree or higher (Matar, 2017). A World Bank survey also indicated that online platform workers are significantly more educated than other workers in the services sector (Datta et al., 2023).

However, possessing high levels of formal education does not appear to be crucial to success in platform work, as **different tasks require different levels of education**. For example, more complex tasks relating to software development or professional services require much higher levels of education than data entry tasks. **Many workers are overqualified for the tasks they perform**, and find it challenging to find work that matches their skillset. For instance, an ILO survey that included Lebanese and Moroccan freelancers revealed that a significant proportion of respondents (29%) reported having more skills than were required for the tasks they were performing. Interestingly, a higher proportion of women (68%) than men (59%) reported that their skills were well-matched to the work they carried out on platforms (ILO, 2021). Focus groups with Upwork freelancers from SEMED countries also indicate that the majority of them do not work in the fields in which they were educated. Instead, they seek those jobs that are in demand on platforms, and pre-qualify themselves independently.

For online platform workers, **digital skills, such as operating various types of software, are crucial for online platform work**. These skills are learned both in formal education, but also through internet tutorials (Lehndonvirta and Albert, 2020). Internet tutorials were cited in the focus groups as more useful because they enable the constant updating of knowledge, which is crucial given the fast pace of technological advances. Research in Jordan shows that platform workers are more versatile

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<sup>22</sup> See COOP Tunisian Freelancers. *Bienvenue dans Tunisian Freelancers COOP*. <https://tunisian-coop.tn/>.

and proficient in modern technologies compared with traditional workers, which contributes to their success on digital platforms (ILO, 2023).

**However, online platform work requires more than just digital and occupational skills.** To succeed in online labour markets, workers also need **English language skills** as well as social skills such as **communication, marketing and time management**. English is crucial for working on global online labour markets, but also for accessing various online training materials. Research by the World Bank reveal varying levels of English language skills among online platform workers from different SEMED countries (Datta et al., 2023). While 54% of Lebanese workers filled in English language questionnaires, the percentage was 22% among workers in Egypt and Tunisia, and only 11% for Morocco. Focus group participants highlighted that apart from English, communication is among the most crucial skills online platform workers should have. They need to understand what clients want, and to be able to present themselves well and negotiate, but also maintain relationships. Notably, most focus group participants reported that they had developed language and communication skills through their formal education. Focus group participants also highlighted the importance of marketing and self-presentation, due to the high level of competition for work on online labour platforms. Time management was seen as important by the focus groups, due to the need to constantly secure new work and work on multiple projects simultaneously.

With regard to work experience, online **platform workers appear to have less previous relevant work experience** than people in regular employment, potentially due to their younger age, and digital platforms are the entry points to employment for many. For instance, a survey in Jordan revealed that platform workers had less work experience than traditional employees, with around 52% having less than 5 years' experience in the field, compared with approximately 39% of traditional workers. This discrepancy in experience was more pronounced in the creative and multimedia sector but much smaller in the writing and translation sector (ILO, 2023).

While initially acquired education and skills are necessary for engaging with platform work, **platform reputation plays a much more significant role in determining success**. Such reputations are built on ratings and feedback from previous clients, along with a history of completed tasks. According to an ILO survey of online freelancers, including those from Lebanon and Morocco, around 80% of respondents reported that reviews and feedback from previous clients were key factors in obtaining new work. The availability of a solid work portfolio and the number of completed jobs followed close behind, with slightly over 50% of respondents considering them important (ILO, 2021). Similarly, focus group participants indicated that undertaking training and listing skills on one's profile is not as nearly as important as having completed many tasks on platforms and received client feedback. Other studies have also confirmed the significance of platform reputation in securing a higher income on platforms (Herman and Nicholas, 2019). However, this system presents challenges for new entrants, whose profiles may be deprioritised by algorithms due to their lower ratings.

When it comes to skills development at work, **platforms and clients typically do not provide formal training opportunities to freelancers**. The role of platforms is merely to mediate in matching supply and demand for work, and they usually do not provide training as employers. Moreover, a representative of Upwork explained in an interview that there is also a need to maintain a clear distinction from an employment relationship, in which the platform would have control over freelancers' work and bear certain legal liabilities. Thus, formal training is missing from online labour platforms due to the lack of a formal employment relationship. Similarly, clients often do not provide training opportunities to freelancers since they are usually seen as short-term independent contractors who do not require skills development (ILO, 2021). Nevertheless, in a World Bank survey, more than 30% of platform workers from Egypt, Lebanon, Morocco and Tunisia indicated platform-provided training as the primary benefit they wish they received from platforms (Datta, 2023). Focus groups also indicated that workers wish they would have more training opportunities on platforms.

**Some platforms do still enable some informal skill development opportunities, however, and allow workers to obtain micro-credentials in the form of certification.** Most notably, in 2020, the Arabic-language platform Ureed, in cooperation with the International Finance Corporation, launched



the training programme 'Mastering the world of freelancing' in Jordan and Lebanon (Datta, 2023). The goal of the programme was to increase the participation of women in online platform work through training, but also to encourage clients to hire women. Some platforms incentivise workers to enhance their skills and gain certificates by using online training tools to build their profiles. For example, PeoplePerHour has an 'academy' via which workers can take courses, acquire skills and earn certificates, which can then be displayed on their profiles. Such training can be particularly helpful for new entrants to platforms, as it allows them to assess and improve their skills, thereby increasing their chances of finding work (ILO, 2021). Some platforms, such as Upwork, also collaborate with third parties to provide training and certification to workers. An ILO survey that included online platform workers from Lebanon and Morocco found that around 20% of respondents obtained such certification. While this has been shown to have some positive impact on earnings, especially for platform entrants, the reputation of the freelancer still plays a more critical role in determining success (ILO, 2021).

Nevertheless, the **majority of skills development on digital platforms occurs through informal learning**. The extent of skills development largely depends on the nature of the tasks freelancers undertake. For instance, occupations such as software development offer significant opportunities for skills development, whereas more repetitive and less skilled jobs such as data entry may not be associated with as much learning. Focus groups indicate that many online platform workers learn job-related skills through their work, but also by consulting various internet sources such as YouTube, and they also obtain micro-credentials through online courses. In addition, through their interactions with international clients, freelancers have the opportunity to develop valuable soft skills, which are not typically provided by formal educational systems. These soft skills include communication, negotiation and collaboration.

**Self-regulatory learning skills** are essential for online work. Because freelancers develop their skills autonomously, they need to identify their own changing skills needs, be proactive in seeking feedback, and be self-reflexive about their own learning strategies. Online labour platforms empower freelancers to monitor and adapt to the changing demands of the global labour market by providing insights into the skills most frequently requested by clients. Once they identify in-demand skills, they can engage in autonomous learning using various learning strategies and materials.

**Career advancement opportunities in platform work may be more limited than in traditional employment**, where employees can advance within organisational structures. In platform work, freelancers are responsible for creating their own career path. However, they can showcase their competence and skills to potential future employers through project portfolios on digital platforms, along with publicly available client feedback. A project portfolio consists of a collection of tasks completed on the platform, such as a catalogue of web page designs for workers in the creative and multimedia sector. Some focus group participants stated that experience on platforms is invaluable because it demonstrates to future employers that they know how to work with international clients. Furthermore, freelancing jobs can serve as a pathway to a more stable career, as some freelancers transition to working directly with clients outside of the platforms. Nevertheless, most focus group participants indicated that recruiters did not view their freelancing career as an asset. This is because they may be perceived as someone who has carried out random jobs, is not used to a stable work schedule, and is not able to work within a company structure. In addition to this, they may not be able to gain reference letters from platform clients, as they would in regular employment. Thus, it may be concluded that the benefits of online platform work experience are ambiguous with regard to career development.

## Chapter 3: On-location platform work

On-location platform work means work intermediated by digital labour platforms that is performed in a specified place. In contrast with online platform workers who work remotely, on-location platform workers must meet their clients or go to a specific physical location in order to implement the task. On-location platform workers may be either employees or self-employed, depending on the specific platform business model. A more detailed explanation of the concepts involved in this research can be found in Annex 1. Conceptualisation of platform work and online freelancing.

Although on-location platform work has been present in the SEMED region for more than a decade, its growth and visibility accelerated significantly during the COVID-19 pandemic. National-level research indicates that food delivery, ride hailing and various types of domestic and care services have emerged as the most popular services facilitated by on-location labour platforms. While the platform economy as a whole is expanding rapidly, its spread varies between countries, and it is primarily concentrated in urban areas. Despite the increasing prevalence of this type of work, research into on-location platform work in the region remains limited, and there is a lack of comprehensive understanding regarding the numbers of workers involved, their profiles, and working conditions.

Nevertheless, this study suggests a growing number of on-location platform workers, who are predominantly young and male, and motivated by higher earnings and/or by a lack of opportunities in the local labour market. The available information also highlights substantial room for improvement in the quality of working conditions, which are currently at a low level. Compared with online platforms, on-location platforms offer even fewer opportunities for skills development, and have a very limited impact on career advancement. Many on-location platform workers are overqualified for the work they do.

### Prevalence of on-location platform work

There are **no accurate estimates regarding the number of people engaged in on-location platform work** in the SEMED region. This lack of data is explained by the fact that the official statistics do not capture this type of work, and on-location platforms are often reluctant to disclose their actual numbers of workers. However, our research indicates that on-location platform work has experienced a significant expansion in the region over recent years.

**On-location labour platforms have been present in the SEMED region for more than a decade.** Notable instances of early penetration include [Talabat](#), a Kuwait-based food delivery platform that entered the market in 2012, and [Uber](#), a US-based platform that made its debut in Egypt in 2014. Local on-location platforms have also been present in the region for a long time. For example, the Israeli ride-hailing platform [Gett](#) transitioned to a digital platform model in 2015.

Desk research and national fieldwork has allowed us to identify 63 on-location platforms active in the various SEMED economies (see Table 3 and Table 4)<sup>23</sup>. **Both global and local platforms are actively operating in the SEMED region.** Several global platforms, such as [Uber](#), [Indrive](#), [Bolt](#), and [Glovo](#) are active in the region, alongside prominent regional platforms such as [Careem](#) from the UAE and [Yassir](#) from Algeria. However, most on-location platforms are currently limited to operating within a single country – for example, [PrestoEat](#) in Libya, [Yummy](#) in Palestine, and [PetraRide](#) in Jordan. Notably, more mature platform service markets such as those in Egypt, Jordan and Israel exhibit an array of platforms, while countries such as Libya have a more limited number of platforms available.

Although platforms differ in terms of the services they provide, they can be grouped into three broad categories:

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<sup>23</sup> This list is not exhaustive, and there are likely to be many more platforms operating within the region.



- **Delivery services** – couriers providing food delivery as well as grocery, medicine or postal delivery services.
- **Ride hailing** – drivers providing taxi services.
- **Domestic and care services** – workers providing a wide range of home or other ancillary services (e.g. plumbing, cleaning, personal training, photography, event planning, tutoring) or care services (e.g. babysitting, nursing).

**Table 3. Multinational on-location platforms operating in the SEMED region**

	Ride hailing					Ride hailing and delivery			Delivery	
Platform	Uber	Indrive	Bolt	Heetch	Swvl	Yassir	Yango	Careem	Glovo	Jumia
Algeria		x		x		x	x			
Egypt	x	x			x			x		x
Israel	x						x			
Jordan	x				x			x		
Lebanon	x	x	x					x		
Libya										
Morocco		x		x		x		x	x	x
Palestine								x		
Tunisia		x	x			x			x	x

Source: compiled for the ETF through the desk research from February to July 2023.

Note: we could not identify any multinational platforms active in multiple SEMED countries that provide domestic and care services.

**Table 4. Country specific on-location platforms in the SEMED region**

	Delivery	Ride hailing	Domestic services
Algeria	FoodBeeper	YallaGo Temtem	
Egypt	Mongez Mrsool Noon Breakfast Elmenus	Didi	FilKhedma Orcas Kazeem Taskty 7keema
Israel	Wolt 10bis JustEat Tapingo GetPackage	Gett	GetCleaner HomeHero
Jordan	DeliveryOne Basket JO Sabaq Ultrac	Jeeny Blacklane TaxiF Petra Ride Queen Car Rayyan road	Mrayti 3oun Bilforon B8ak Khadamat House Kebir Kader Wecare

	Delivery	Ride hailing	Domestic services
			Carers
Lebanon	Handiss Toters Bitfood Onlivery		Jaleesa
Libya	PrestoEat	Turbo Taxisti	
Morocco	Kaalix Livry	Roby Taxi TaxyDaba TaxiF Talixo	
Palestine	Yummy.ps HAAT Wheels delivery Ways delivery Mughtarib		
Tunisia	Founa Wefood Tayara Kool	Sabil IntiGo	Homeschooltunis Bambinosit iJeni

Source: compiled by PPMI and national experts through desk research between February and July 2023.

**Global platforms are more prominent in certain markets, while local and regional platforms dominate in others.** In Egypt, Uber dominates the local ride-hailing market, with 90% of all on-location platform workers in the country working for this platform (Fairwork, 2021). Egypt is also Uber's 13th-largest market globally (Gaber and Elsamadicy, 2021). In some of the other markets, the penetration of global platforms was quite limited. Uber pulled out of Morocco in 2018 after protests from taxi drivers, and the market was taken over by a regional ride-hailing service, Careem (Kasraoui, 2018). In Israel, UberX was never launched due to resistance from taxi drivers' unions, but also due to a lack of compatibility with local legislation, which requires all commercial taxi drivers to have licences. This enabled the local platform Gett, which complies this regulation, to dominate the local market (Nathanson, 2023). Similarly, Careem was banned from operating in Palestine after protests from local taxi drivers' unions.

Although on-location platforms entered the public debate through conflicts with local taxi drivers, it was during the COVID-19 pandemic, particularly in 2020-2021, that such services expanded rapidly and came into the public spotlight.

**The pandemic had varying effects on on-location platforms,** depending on the nature of their services. The delivery sector witnessed significant growth due to increased demand for food delivery services as a result of lockdown measures. This surge in demand led to an increase in the number of orders, the formation of new partnerships (not limited to restaurants, but including deliveries from supermarkets, pharmacies and beauty shops), a rise in the number of couriers, and an expansion in geographical coverage. Conversely, ride-hailing and domestic services witnessed either stagnation or moderate growth, as demand was not as high during lockdowns. For example, ILO research in Lebanon found that 80% of platform-based drivers stopped working during the pandemic for shorter or longer periods of time. Large numbers of drivers also reported that they stopped operating completely, with almost half of them switching to traditional taxi driving up to 2021 due to this being subject to fewer work restrictions during the pandemic (Yassin and Rani, n.d.). Nevertheless, digital platforms not only gained significant popularity and visibility during the pandemic, but also became important employment options for many workers who lost their jobs during this period.

**The development of on-location platform work in the SEMED region has been characterised by uneven geographic expansion.** Countries that are more digitally advanced and with higher levels of economic development, such as Israel, as well as more populous countries such as Egypt, experienced a significant increase in the number of digital platforms. In contrast, less digitally advanced and crisis-ridden countries such as Libya witnessed the delayed emergence of platforms. Furthermore, across all countries in the SEMED region, platforms primarily emerged in larger cities, where there was sufficient demand for the services being provided. Rural areas, on the other hand, did not experience a substantial expansion in the platform economy. This can be attributed both to a lack of demand and to lower levels of internet usage in these regions. This disparity between rural and urban areas highlights the pronounced rural-urban divide within the platform economy.

The prevalence of platforms and platform work may also have been influenced by **trust in digital services.** For example, national research in Jordan shows that customers trust digital platforms more than regular taxi services due to the greater accountability of drivers and higher standards of vehicle quality. This is in contrast with local taxi companies, which are often accused of fraud and having poor-quality vehicles.

## Attractiveness of on-location platform work

Several factors that influence the attractiveness of on-location platform work in the SEMED region have been identified through national fieldwork and desk research (ILO, 2021). These can be divided into 'pull' factors – namely, opportunities provided by platform work, and 'push' factors – external factors that force workers to seek work on platforms.

This research identifies the following **pull factors: low entry barriers, competitive compensation, and flexibility.**

Platform work is considered an appealing alternative to regular employment, primarily due to its generally **low entry barriers.** Workers face minimal requirements to start work on platforms, making it accessible to the unemployed, young people, students and immigrants. **Most on-location platform jobs do not demand specific educational qualifications, experience or specialised skills.** For instance, ride-hailing and delivery companies only require workers to know how to drive, possess basic time management and communication skills, and be familiar with using apps. Sometimes, they do not even need to speak the local language. Typically, new recruits undergo a brief training session on app usage. It is important to note that certain domestic services may require skilled technicians or medical professionals with higher levels of education and extensive experience. In terms of **legal requirements,** workers in ride-hailing and delivery companies typically need a valid driving licence, which is usually obtainable by most people. However, for some immigrants and refugees, obtaining a driving license or registering as an individual entrepreneur may be difficult, as is the case in Jordan. Moreover, workers usually need only **basic capital,** such as a personal car or motorcycle, to get started. Nevertheless, this can still pose a barrier to individuals who cannot afford to own a vehicle or whose vehicle does not meet the standards set by the platform (Uber, n.d.b)<sup>24</sup>.

The attractiveness of platform work is also influenced significantly by the **relative earnings** it offers. If the income from platform work exceeds that of most jobs in the local labour market, it becomes more popular, and vice versa. In countries such as Lebanon, where most citizens live in poverty, platforms are viewed as one of the few options to make ends meet (Gebeily and Azhari, 2021). Research in Lebanon shows that income on ride-hailing platforms is significantly higher than in the traditional taxi sector, and that workers opt for platform work precisely because of the higher relative earnings (Yassin and Rani, n.d.). Conversely, in countries such as Morocco, platform income often remains close to the minimum wage, rendering these jobs less attractive to workers.

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<sup>24</sup> Certain platforms, such as Uber, require applicants to have relatively new vehicles with a valid vehicle registration and roadworthy certificate.

Lastly, **flexibility** is often cited as one of the main reasons why people choose to engage in platform work. On-location platforms frequently offer flexible working hours, allowing workers to choose their own schedules. This flexibility is particularly valuable for those with caring responsibilities, such as women balancing work and family commitments, and students who need to attend university. However, unlike online platforms, on-location platforms do not provide flexibility with regard to location, which means that working from home is not an option. This can make on-location platform work more challenging for individuals with caring responsibilities or physical disabilities, when compared with online work.

In addition to the above pull factors, this research also identified **the main push factor: the unavailability of other jobs in the labour market**. This means that the popularity of platform work in the country depends on the number and quality of alternative job opportunities in the local labour market. Like online freelancing, on-location platform work serves as an alternative to regular employment when traditional job options are limited. This trend was particularly evident during the COVID-19 pandemic, when individuals in the SEMED region who had lost their jobs sought alternative employment on platforms, especially in the delivery sector. While some workers view platform work as their primary job, others see it as a part-time option to supplement their main income. However, for many, it remains a temporary solution until they can secure better employment opportunities. An ILO survey from 2019 shows that around 40% of workers on delivery and ride-hailing platforms in Lebanon, and over 60% in Morocco, carried out these jobs because they could not find other employment (ILO, 2021).

Workers from the SEMED region **discover on-location platform work opportunities via the internet, personal connections and platform recruitment campaigns**. In interviews, workers indicated that they primarily found jobs **via the internet**, in particular through social media websites such as Facebook, Instagram, LinkedIn, Twitter and YouTube. Local influencers also played a role in this process. Some individuals also reported finding opportunities through jobseeking portals and advertisements. Many workers reported securing jobs through **personal connections**. This involves word-of-mouth recommendations and personal referrals from individuals already employed in the sector. Lastly, some workers mentioned finding work through **platform recruitment campaigns**, which can include in-person events and advertisements on billboards in cities.

## Occupations and profiles of workers

**Ride hailing and delivery are the dominant occupations among on-location platform workers**, although there are also numerous specialised domestic service platforms in operation. However, obtaining data on worker profiles for on-location platform workers is more challenging compared with online platform work. While the profiles of online platform workers are publicly available on platforms, on-location platforms do not share such data.

With regard to **gender, the vast majority of ride-hailing and delivery workers across all SEMED countries are male**. For instance, it is estimated that in Jordan, women comprise less than 10% of registered platform drivers, while this figure is even lower in Morocco and Lebanon, with only around 2% of the drivers in one survey being identified as female (ILO, 2021). Furthermore, in Morocco and Lebanon, all delivery riders identified in a survey were men, with no women being reported as working in this occupation. Conversely, **women are overrepresented on certain domestic platforms**, particularly in care and cleaning occupations. There are certain exceptions to this rule, such as [Pink Taxi](#), an all-female ride-hailing service in Egypt.

**Platform workers in the region are primarily young**, encompassing a large number of young jobseekers who are awaiting more stable employment, or students working part-time to support themselves. Nevertheless, research has also identified middle-aged individuals and some pensioners seeking to increase their incomes through part-time platform work. It is noteworthy that the majority of platforms do not accept workers under the age of 18, as seen in the case of Talabat (Talabat, n.d.), and some platforms have raised their minimum age requirement to 21, such as Uber (Uber, n.d.a).

Country-level research indicates that on-location **platform work is also inclusive towards immigrants and refugees**, who encounter difficulties in accessing regular employment in local labour markets. For example, in a 2019 ILO survey in Lebanon, around 30% of all delivery workers surveyed were immigrants (ILO, 2021). In Libya, many settled refugees find jobs on delivery and ride-hailing platforms, and the same applies to Syrian refugees in Jordan. However, as mentioned previously, **they may still face entry barriers** such as the inability to obtain a driving licence or register as self-employed.

In terms of work duration, most on-location platform workers are **recruited for short periods**, usually several months. Workers can choose to work **either full-time or part-time** on platforms, depending on whether they are seeking a primary source of income or wish to supplement their existing earnings.

## Working conditions

National-level fieldwork and desk research have shown that **working conditions for those working via on-location platforms in the SEMED region are generally poor**. Workers face challenges such as a lack of social protection and a high degree of informality, inadequate safety measures at work, limited career development prospects and difficulties in unionising to improve their working conditions. This is one of the main reasons why on-location platform workers regard their work as insecure and temporary. The only exception to the poor working conditions on on-location labour platforms are the relatively high earnings.

**Income on on-location platforms is usually higher than in traditional employment.** An ILO survey from 2019 shows that hourly earnings on ride-hailing platforms in Lebanon are around 80% higher than in the traditional taxi sector, while in Morocco, this difference is around 25% (ILO, 2021). When it comes to the delivery sector, platform workers in Lebanon earn around 25% more than their counterparts in the traditional delivery sector. However, in some contexts, these earnings are not significantly better than in traditional employment. A recent Fairwork Egypt study shows that 8 out of 10 platforms pay their workers at least the minimum wage, which was around EUR 70 per month for a six-day working week in 2022 (Fairwork, n.d.a). Orcas stands out as the only platform in Egypt providing its workers with a living wage of around EUR 150 per month.

Although earnings on digital platforms are usually above local wages, workers' livelihoods in most of the countries in the region have been impacted by **soaring living expenses**. For instance, in Egypt, inflation jumped from 8% in 2021 to 31% in 2023, combined with a 42% devaluation in the Egyptian pound during 2022. Consequently, many platform workers in the country need to work extra hours or even resort to working on multiple platforms to make ends meet (Fairwork, n.d.a). Aside from living expenses, drivers and delivery workers face **significant expenses for fuel, repairs, equipment or renting out vehicles**.

**The social protection available to workers largely depends on their legal status.** Most workers in the SEMED region are **usually either registered as self-employed or work informally**, leaving them **unprotected by labour laws**. Furthermore, **platform workers lack the representation of their interests** that would be provided by unions or other representative bodies. While some progress has been made in Jordan regarding the registration and licensing of platform businesses, many platforms still operate informally and thus escape the scrutiny of state authorities due to administrative and financial challenges in monitoring the platform economy. This explains why informality in platform work is in general deemed very high, well above the national averages of 40% among Jordanians and 80% amongst non-Jordanians in 2020 (The Jordan Times, 2020). The Fairwork study in Egypt found that only 5 out of 10 platforms provided contracts with clear and accessible working conditions in compliance with local laws (Fairwork, n.d.a). However, even for those with contracts, labour laws in the country are not adapted to the changing nature of work, making it easy for employers to violate workers' labour rights without facing penalties from the state. In contrast, informality is not as widespread in Morocco, where couriers and drivers often have contracts and monetary transactions with platforms that are monitored by the government.



Platform work, which is usually informal, **rarely provides access to employment benefits such as healthcare, accident insurance or pension schemes.** This is due to the lack of accountability of digital labour platforms, which do not act as regular employers. For example, Algerian workers, even when working for international platforms such as Yassir or Heetch, do not enjoy the same social protection as those employed by regular taxi companies (Aurjourd'hui, 2022). In Lebanon, meanwhile, most ride-hailing platform workers do have health insurance, but this is not provided by platforms. Most of them have other jobs, through which they have access to national health insurance coverage. However, these workers are eligible for accident insurance only in exceptional cases (Yassin and Rani, n.d.).

Due to the lack of employment contracts and legal protection, **platforms often neglect the well-being and safety of workers.** In particular, this is a problem in the ride-hailing and delivery sectors, where workers drive for exceptionally long shifts, significantly increasing the risk of accidents. An ILO research paper on Lebanese ride-hailing platform workers found that on average, they work a staggering 69 hours per week (Yassin and Rani, n.d.). This is significantly higher than the threshold set by international conventions on working hours, which stand at a maximum of 48 hours per week (ILO, n.d.). This figure of 69 hours is also higher than the working hours of regular taxi drivers (Yassin and Rani, n.d.). Another ILO survey indicates that Lebanese and Moroccan workers on delivery and ride-hailing platforms work longer hours than their counterparts in traditional sectors (ILO, 2021). The same research shows that 34% of app-based taxi drivers in Morocco reported experiencing work-related injuries or accidents. In the ride-hailing and delivery sectors, assaults on workers and robberies have been also identified as a serious issue, as observed in Morocco.

On-location **platform workers also face workplace harassment or discrimination.** Harassment usually consists of aggressive behaviour or sexual harassment, while discrimination is mostly based on gender or ethnicity. In most cases, the perpetrators are customers of taxi or delivery apps. According to an ILO survey in Lebanon, 42% of app-based drivers and 23% of app-based couriers stated that they experienced or witnessed discrimination or harassment. In Morocco, the figure was 38% for both drivers and couriers (ILO, 2021). Furthermore, desk research indicated that on domestic work platforms, matching workers with unknown clients to perform tasks in their homes has been observed as risky, especially for female workers.

Nevertheless, **some platforms in the region are improving their safety measures.** The Fairwork Egypt study indicates that most platforms have taken some action to provide workers with adequate health and safety protection (Fairwork, n.d.a). However, only four platforms (Breadfast, Elmenus, Mrsool, and Talabat) provide couriers with safety gear, rest stops, medical insurance and an accident reimbursement system that ensures compensation in the event of road accidents and covers recovery costs. Uber also has a documented policy to protect workers from task-specific risks, including an accident insurance policy. One platform, Filkhedma, offers detailed safety training to its workers and allows female workers to reject tasks in single-male adult households. Fairwork research in Tunisia also found that local digital platforms generally provide safer client/worker matching in the domestic service sector compared with traditional word-of-mouth methods (Fairwork, n.d.b). In 2021, the delivery platform Glovo, operating in Morocco and Tunisia, launched a global initiative called 'The Courier Pledge', which provides social benefits to platforms' workers, including maternity/paternity benefits, sick pay and payments to couriers' relatives (The Pledge, n.d.).

**Improving working conditions through unionisation poses a significant challenge for platform workers** compared with those in traditional employment. In most countries, platform workers lack legal entitlements to unionise, thus granting digital platforms considerable power to unilaterally change employment agreements and compromise working conditions, such as by reducing pay. Without the support of unions, workers find it difficult to resist harmful changes and to actively advocate for better working conditions. One case in point is that of Wolt in Israel, which introduced two major changes that adversely impacted workers' income (Nathanson et al., 2023). First, the platform modified its 'payment per delivery' policy, resulting in reduced earnings for short-distance deliveries. A mere 2 months later, it then altered the allocation of deliveries, again worsening courier compensation. Despite protests by groups of couriers, their lack of unionisation undermined efforts to challenge these

decisions. Conversely, in Jordan, informally-organised platform drivers managed to consolidate their demands, which were expressed during sit-ins at the platform company's headquarters. While some of these demands have been discussed in the Jordanian parliament, their impact has so far been limited<sup>25</sup>.

Lastly, the **COVID-19 pandemic has had ambiguous effects on labour platforms**. On the one hand, it brought platform workers into the spotlight, leading to increased awareness of their working conditions, for example in Lebanon (Maktabi et al., 2022). On the other hand, the sudden surge in platform work during the pandemic resulted in unplanned hiring practices, leading to deteriorating working conditions and significant layoffs due to an oversupply of workers. In addition, platform workers faced heightened exposure to infection due to frequent customer interactions and a lack of workplace protection.

## Workers' skills

Skills development is not commonly associated with on-location platform work, in contrast to online platform work, which provides limited opportunities for skills development. This is primarily due to the low skill requirements for most of the jobs available on these platforms, and the consequent overqualification of a large number of workers.

**Significant variations exist in the educational backgrounds of on-location platform workers**, and individuals with high and low levels of education both participate in similar types of job. For instance, workers in Jordan who engage in lower-skilled jobs such as domestic home cleaning services often have a lower education, and may include refugees from Syria whose education was disrupted (MoDEE, 2019). Similarly, more than 90% of platform delivery workers and over 97% of platform drivers in Lebanon have a secondary education or lower (ILO, 2021). On higher-skilled platforms, such as care services, workers in the SEMED region may hold university degrees.

Notably, there are many instances in which **the skills of workers are higher than those required by the platforms**. For example, research in Morocco reveals that nearly half of platform drivers and around a third of delivery workers have a university education, rendering them overqualified for the platform work they perform (ILO, 2021). This discrepancy poses significant challenges, including deskilling and job dissatisfaction.

On-location platform work generally offers **limited prospects for upgrading skills and career development**. This is primarily attributed to the low skill requirements prevalent in most on-location platform jobs, the temporary nature of the work, and workers' detachment from company organisational structures. Although delivery and ride-hailing apps provide some training, mostly focusing on app usage, safety, and customer service (over 90% of workers in Lebanon and Morocco receive such training), these low-level and job-specific skills may not be transferable to better-paying employment opportunities (ILO, 2021). While the national fieldwork indicates some cases in which workers may advance to become team leaders and eventually be hired as employees after proving themselves on platforms, such instances remain rare. Along with overqualification, a lack of career development prospects is one of the main reasons why large proportions of workers regard on-location platform work only as a temporary solution and not a long-term career choice.

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<sup>25</sup> Among these demands, collected in 2023 by the Phenix Center for Economic and Informatics Studies, were a reduction in the amount platform companies deducted from customers' payments from 20-30% to 15%, ending customer payments by Visa card (as actual payment only occurs 2 or 3 days later), and an increase in the operational age of cars on digital platforms from 5 to 10 years; the last of these claims was discussed at the Parliament. For more information, see: <https://jordantimes.com/news/local/govt-urged-increase-operational-age-ride-hailing-app-vehicles#:~:text=We%20demand%20to%20raise%20the,be%20older%20than%20five%20years.>



# Chapter 4: Current regulation, policies and strategic approaches on the new forms of work

## Labour market and employment

In the countries of the SEMED region, **there are no specific laws addressing the regulation of platform work**. Despite policy debates in countries such as Egypt, Jordan and Algeria about creating separate legal categories for platform workers and freelancers that are distinguished from regular self-employment, as yet no such regulations have been passed or implemented. Several factors could account for this situation. In Jordan, a lack of data and knowledge among policymakers appears to be a hindrance (MoDEE, 2019). In Israel, parliamentary debates have taken place on the issue, but no concrete decisions have yet been reached. In countries such as Libya, labour regulation is generally poor and informal work is extremely widespread, so the nature of platform work replicates the conditions of the traditional labour market.

While there is **no evidence of the existence of regular employment of platform workers** in the region, some efforts have been made to grant employment status to platform workers. In Israel, the National Labour Court ruled that independent contractors working on on-location platforms should be considered workers due to their lack of independence and their integration into the company. This decision, if implemented, would grant platform workers the same rights as regular employees, although its effects are yet to be seen (Knesset, 2021).

As a result of the lack of regulation and formal employment relationships, both online and on-location **platform workers are left with only two options: either to register as self-employed, or to work informally**.

**Self-employed workers are treated as entrepreneurs rather than employees**. They are responsible for managing their own legal affairs, including registering with the relevant authorities and handling income taxes and contributions. While in some countries they may be eligible for benefits such as healthcare and pensions, they are not entitled to other employment benefits. Some changes are being made to the conditions of self-employment. Algeria, for instance, is working on regulating self-employment and simplifying the registration process (Joradp, 2023). The country aims to establish a national register of self-employed individuals, expand the list of eligible professions, enable registration via online platforms, and to monitor, support and control the activities of self-employed workers (Joradp, 2023).

**Even where workers have a services contract, these are usually not legally enforced**. For example, a Fairwork study in Egypt identified that only 5 out of 10 platforms provide service contracts with clear and accessible working conditions in compliance with local laws, although it is unclear how many workers actually receive these (Fairwork, n.d.a). Even where contracts are issued, platforms regularly violate workers' labour rights without facing penalties from the state. Furthermore, employers might be reluctant to provide copies of contracts to the workers, and workers themselves may have little interest in them. According to a study conducted in Lebanon less than one-fifth of ride-hailing platform workers have seen copies of their contracts. Out of these, one-third reported that they did not read the contract. Almost 70% of all workers surveyed stated that seeing their contract was not important (Yassin and Rani, n.d.).

Indeed, **the majority of platform and online workers in the region still operate informally, as our fieldwork indicates**. This informality can be driven by workers' desire to maximise their income, insufficient state capacity to enforce tax compliance and the absence of adequate legal frameworks regulating this type of work.

For example, in Egypt, the majority of platform workers work informally, while a number of them are also self-employed and thus Egyptian labour law does not apply to them. In Jordan, despite some

progress in registering and licensing platform businesses, like in Egypt, many platforms still operate informally and avoid scrutiny from state authorities due to administrative and financial challenges in monitoring the platform economy (ILO, 2023). The rate of informality among platform workers in Jordan is estimated to be even higher than the already high national rate of informality, which accounts for over 50% of all employment in the country (The Jordan Times, 2020).

Morocco stands out as an exception in the region with regard to the prevalence and tolerance of informal work. Country-level fieldwork reveals that informality among on-location platform workers in Morocco is not as widespread as in other countries, as couriers and drivers often have contracts and monetary transactions with platforms are monitored by the government. In addition, online freelancers may face sanctions if they fail to report income from this type of work. Authorities have the power to access customers' bank accounts if they suspect tax evasion. However, some freelancers have found ways to evade state control by receiving payments into foreign bank accounts or in cryptocurrencies.

Lastly, there is a complete **lack of collective representation of online and on-location platform workers in SEMED**. Unionisation is not an option for most platform workers in the region, due to their lack of employee status. And even in cases where some form of collective action by platform workers has occurred, such as in Israel and Jordan (see the section on Working conditions), this has not resulted in formalised organisations that could wield a larger influence on platforms or policymakers.

## Skills and human capital development

Skills development is essential for the growth of platform economy, particularly in relation to online platform work. The present research has identified **several governmental and non-governmental initiatives aimed at equipping populations with the skills necessary for their participation in the digital economy**.

**Government initiatives have mostly focused on the general development of digital skills needed for the private sector and online freelancing, but also on increasing employability among underemployed social groups** such as young people, women, ethnic minorities and refugees. For example, the Digital Egypt initiative collected information on the skills needed by employers in the private sector, particularly in the area of ICT. On the basis of this it created government training programmes. The Egyptian government also created an FWD ('Future Work is Digital') scholarship for longer training programmes in tech professions, and 100 000 people have already completed this programme (Ministry of Communications and Information Technology, n.d.). This programme also places a particular emphasis on the skills needed to establish an online freelancing career; alongside similar initiatives in Egypt such as the learning hub Mahara Tech, which is designed specifically to facilitate online platform work (MaharaTech, n.d.). Similarly, the government in Morocco has committed itself to securing half a million jobs for young people through digital skills development, with some programmes focusing specifically on the developing the skills needed for online freelancing. The Jordanian government, in collaboration with the private sector, has designed programmes for digital skills development among employees in private companies, with women comprising 35-45% of the beneficiaries (MoDEE, n.d.). The country's government has also founded 'knowledge stations' in rural areas aimed at expanding access to digital and soft skill training for rural young people. In Israel, the government has focused on developing digital skills among populations that are currently not participating fully in the digital economy, primarily people with disabilities, Muslim women and Orthodox Jews (OECD, 2023).

Aside from government initiatives, **several important non-governmental initiatives have been launched with the aim of improving digital skills and expanding young people's access to digital jobs in the region**. These include initiatives such as Digital Jobs Africa, a Rockefeller Foundation initiative operating in Egypt and Morocco, and the World Bank's Youth, Technology and Jobs Project in Jordan (Rockefeller Foundation, n.d.; World Bank, 2024). In Morocco, 3W academy and YouCode initiatives provide free training in tech professions for young people to boost the local IT industry and to encourage online freelancing (3WAcademy, n.d.; O'Herron, 2019). EFE-Palestine and

Gaza Sky Geeks are programmes specifically designed to increase employment opportunities for young people in Palestine by supporting the development of freelance careers (EFE, n.d.b; Gaza Sky Geeks, n.d.). This is crucial, due to the absence of other high-quality, high-skilled employment opportunities in Palestine.

Gaza Sky Geeks is an initiative by the humanitarian NGO Mercy Corps that started in 2011 and currently operates in Gaza, the West Bank and East Jerusalem. For those seeking a career as online freelancers, this initiative offers two types of programmes: Freelance Academy mentorship, and Code Academy courses. The Freelance Academy, run in cooperation with Upwork, supports online platform workers to better understand online labour platforms by focusing on building a competitive platform profile, applying for jobs, and communicating and negotiating with clients. By 2023, the Freelance Academy had provided training to 2 225 online platform workers, the majority of whom were women. In contrast, Code Academy focuses more on technical skill development. This programme offers basic and advanced courses in web development, one of the most in-demand skills on online labour platforms. More than 130 online freelancers have completed training with Code Academy. The Gaza Sky Geeks initiative also supports the inclusion of refugees in online platform work opportunities. For example, the initiative organised a four-day boot camp to boost online freelancing skills in the Palestinian refugee camp of Al Faraa.

Lastly, the **private sector has also engaged in tackling the skills gap** in the digital economy (Blom et al., 2021). One successful example of a private sector-led upskilling programme is the Google-led Maharat Min Google which provides young Arab people with free online learning opportunities in the fields of coding, design and marketing (Skillshop, n.d.). The programme also offers certificates that are further accredited or validated by universities and other educational institutions. Similarly, SAP Training and Development Institute offers tech apprenticeships for unemployed or underemployed graduates from Egypt and Morocco through its Young Professionals Programme (Edge, 2021). This is a 2-3 month programme that teaches the functionalities of SAP software and provides certifications. Hsoub, a group of internet businesses serving Arabic-speaking users, helps people to acquire digital skills through its Academy, and offers opportunities to apply these skills through its freelancing platforms (HSOUB, n.d.).

## Digitalisation

**In almost all countries in the SEMED region, there are initiatives aimed at improving ICT infrastructure, digitalising public services and boosting business digitalisation.** These interventions are important for the further development of digitally mediated new forms of work, but also for the digital economy in general.

**Governments in the region have put significant efforts into setting up ICT infrastructures, but the extent of such development varies between countries.** Stable internet connections are essential to enable and facilitate platform-mediated work. Israel was the first country in the region to focus on developing infrastructure such as broadband and fibre optics, enabling a broader digital transformation to take place in the country. These developments were part of the Digital Israel initiative, which began in 2013 (Axelrad et al., 2022). Similarly, in 2020, Egypt successfully completed a four-year strategy under which the government significantly expanded the country's internet infrastructure, increasing its accessibility and affordability throughout its regions (PwC, n.d.). The expansion of internet coverage in Jordan has also been successful. Although the initial target of achieving 100% internet access by 2022 was not met, 88% of the population had access to the internet in 2023 – a significant proportion<sup>26</sup>. Jordan's remaining population without internet access mainly comprises Syrian refugees<sup>27</sup>. In Libya and Palestine, however, internet infrastructure is still mostly underdeveloped. In Palestine, this lack of infrastructure can be explained by the absence of a

<sup>26</sup> Interview with Linda Habashneh and Satei Mbaidin conducted for the project.

<sup>27</sup> *Idem*.

relevant policy and regulatory environment for the telecom sector, as well as restrictions imposed by Israel (World Bank, 2021). Due to these restrictions, Gaza is limited to 2G, and the West Bank to 3G mobile networks (World Bank, 2022b). The inability to access 4G networks in Palestine is an unbridgeable hurdle for the development of the digital economy in the territory (Lazaroff, 2022).

**Overall, the availability of digital public services has increased across the region, but with significant challenges in the process.** E-government services are important for streamlining the fulfilment of self-employment obligations, such as regulating taxes and social security. The Digital Israel initiative set smart governance as one of the government's priorities and succeeded in improving public services, increasing the efficiency of government administration and ensuring smart governance through digitalisation (Axelrad et al., 2022). Similarly, the digitalisation of public services and stronger digital governance were also achieved by the Digital Egypt initiative (PwC, n.d.). While progress towards the digitalisation of public services in Jordan has been significant, it has been slower than expected. Further digitalisation has been hampered by the limited digital proficiency of many civil servants as well as public mistrust in digital services (PwC, n.d.). In Libya, the government has committed to digitalising public services, but the results of this are yet to be seen. Similarly, while the Palestinian government committed to digitalising public services as early as 2010, no results are yet visible.

**There is also a strong commitment to the transformation of the private sector in the SEMED.** The ongoing digitalisation of the private sector could lead to a further proliferation of platform and freelance work. Digital Israel, the first such initiative in the region, focused on digitally transforming the Israeli economy to boost innovation and accelerate economic growth. However, this initiative faced certain setbacks, leading to delays in the digital transformation process (Axelrad et al., 2022). The Digital Egypt initiative had the same goals. It too resulted in moderate success, primarily in relation to setting up a legislative environment for the onset of the digital economy. Some countries, such as Jordan and Algeria, have focused on the development of start-ups. Jordan has launched incubation and acceleration programmes with a focus on women and young people (MoDEE, 2019). In 2020, the Algerian government launched measures to support self-employed individuals and the creation of start-ups. These included providing investors and founders with benefits and legal stability, but also provided funding for start-ups (Startup, n.d.; ASF, n.d.). Over a two-year period, these measures led to the creation of 63% of all start-ups in the country (APS, 2021). In Libya, digital transformation of public sector has remained quite limited due to the lack of proper institutional and legislative frameworks for the adoption of the digital economy, as well as conflicting policy measures, and the absence of a national strategy on digitalisation.

## Chapter 5: Main findings and policy pointers

### SWOT analysis

To summarise the major potentials and challenges of online work on and off digital platforms, and of on-location platform work within the SEMED region, we undertook a SWOT analysis, drawing insights from extensive desk research and on-site investigations. The SWOT framework outlines the strengths, weaknesses, opportunities and threats of online and platform work. Our analysis concentrated on three pivotal domains: education and skills development, digitalisation, and labour market regulations and policies.

Platform work in the SEMED region exhibits substantial strengths, providing workers with avenues to secure employment, increase their income, embrace flexible work arrangements, and in some cases develop skills. However, these advantages coexist with poor social protection and labour rights; irregular patterns of income; limited inclusivity, career and skill development opportunities; lack of transparency in platform algorithms; dependence on digital infrastructure that is not universally available; and a lack of data about platform work. On a broader scale, the platform economy holds the potential to counter high unemployment rates in the region, and to address the lack of prospects among its young people, women and marginalised social groups. Nevertheless, it is crucial to refrain from viewing these new forms of work as a universal solution to unemployment, as they can also reproduce inequalities by offering unequal access to a small number of high-quality positions. Furthermore, the absence of adequate recognition and regulatory measures pertaining to this type of work could hinder the realisation of the full potential of platform work. A summary of the SWOT analysis is presented in the figure below.

**Figure 26. Online and on-location platform work in SEMED region: SWOT analysis**

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>New employment opportunities, particularly for women, young people and marginalised social groups</li> <li>Low entry barriers for on-location platform work</li> <li>Possibility of high income prospects in online freelancing and platform work compared with local labour markets</li> <li>On-the-job (transversal) skills development opportunities on online labour platforms</li> <li>Flexible work arrangements with regard to time and location in the case of online platform work</li> </ul>	<ul style="list-style-type: none"> <li>Undeclared work and tax evasion</li> <li>Lack of social protection, labour rights and labour representation for workers</li> <li>Irregular incomes, particularly on online labour markets</li> <li>Insufficient inclusion of marginalised social groups</li> <li>Lack of, or insufficient, access to off-the-job skills development opportunities and certification</li> <li>Limited skills development opportunities</li> <li>Weak career guidance and counselling services</li> <li>Lack of transparency in platform algorithms</li> <li>Lack of data about platform work</li> <li>Dependence on digital infrastructure, equipment and e-payment systems that are not universally available</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>Reducing unemployment in job-scarce contexts</li> <li>Reducing labour inactivity through new job opportunities</li> <li>Potential for female employment, particularly on online platforms</li> <li>Proliferation of graduate-level jobs through online freelancing and platform work</li> <li>Development of in-demand skills</li> <li>Integration of refugees into the labour market</li> </ul>	<ul style="list-style-type: none"> <li>Stagnant demand for online platform work (OLI 2020b)</li> <li>High global competition on online labour markets and unequal access to work</li> <li>Gaps in digital infrastructure</li> <li>Insufficient digital, occupational, business and language skills</li> <li>Lack of acknowledgement of new forms of employment in regulation and policy</li> <li>Risk of further polarisation of the labour market and unequal distribution of employment opportunities</li> </ul>



## Policy pointers

To promote and ensure the positive impact of online and platform work on workers, businesses and states within the SEMED region, it is imperative to formulate policy interventions across key areas. These encompass aligning labour market regulations with the evolving landscape of work, developing the skills essential for participating in the platform economy, and facilitating the requisite level of digitalisation for its growth. The table below summarises the key policy pointers emerging from the present study's findings, while the sections that follow discuss in detail the underlying evidence and possible policy measures for each key area.

**Table 5. Summary of policy pointers**

Labour market and employment	Skills and human capital development	Digitalisation
<ul style="list-style-type: none"> <li>▪ Facilitating the correct determination of platform workers' employment status</li> <li>▪ Securing social protection of the workers</li> <li>▪ Countering informality in the platform economy</li> <li>▪ Monitoring trends in the platform economy</li> <li>▪ Supporting the establishment of workers' representation bodies</li> <li>▪ Supporting transition to new forms of work through Public Employment System (PES)</li> <li>▪ Securing employment for young people through digital platforms</li> <li>▪ Facilitating the participation of women in the platform economy</li> <li>▪ Providing refugees and migrants with access to platform work</li> </ul>	<ul style="list-style-type: none"> <li>▪ Upgrading essential digital skills among students, the economically inactive population and the general workforce</li> <li>▪ Enabling better skills recognition and signalling on digital platforms</li> <li>▪ Providing access to micro-training in domain-specific skills, coupled with the development of relevant micro-credentials</li> <li>▪ Building stronger English language skills</li> <li>▪ Encouraging personal, social and learning to enhance competences from early education onwards</li> <li>▪ Providing opportunities for the development of entrepreneurial skills</li> </ul>	<ul style="list-style-type: none"> <li>▪ Improving ICT infrastructure and its inclusivity</li> <li>▪ Expanding access to international payment systems</li> <li>▪ Facilitating digital transformation within the private sector</li> </ul>

### Labour market and employment

To fully leverage the advantages offered by the platform economy while ensuring decent work for all and avoiding labour market polarisation and segmentation, it is imperative that appropriate labour market policies are implemented. Such policies encompass an array of measures, ranging from **regulating the employment status of workers and guaranteeing their social protection, to ensuring employment for young people and women, fostering the integration of marginalised populations into the platform economy, and helping individuals to navigate the realm of platform work effectively.** These labour policies are relevant to both online and on-location platform workers.

**Ensuring protection and rights for platform workers remains pivotal for policymakers.** The present research underlines the fact that both on-location and online platform workers suffer from poor working conditions and a lack of legal protection. **A foundational step towards safeguarding labour rights is to clarify who the employers are, and to establish the employment status and tax obligations of platform workers and freelancers.** While the European Union (EU) has engaged in significant policy dialogues and endeavours to regulate platform work, both at EU level via new legislative proposals, and at national level (e.g. in Spain), analogous initiatives are lacking in the SEMED region (European Commission, 2021b). Hence, policymakers should understand the importance of regulating this type of work and include it in future policies for labour regulation. This could encompass updating labour codes to incorporate less conventional forms of work, or streamlining the process of self-employment – an option preferred by many online freelancers and

platform workers. However, regulating platform work is a complex task. On the one hand, labour market flexibility could facilitate access to more job opportunities in SEMED countries, enabling them to combat high unemployment rates. On the other hand, flexibility should be coupled with legislation on employment protection, job quality and workers' rights, the violation of which may be more at risk in these types of jobs, particularly in the absence of workers' representation. At the same time, it is important to note that regulation of platform work is not seen as desirable by some categories of platform workers, and high taxes can discourage some from registering their activities. This is particularly relevant for those workers who use platforms to earn additional income and are already covered by social protection through their main job in the traditional labour market. **Thus, governments would need to find a balance between overregulation and no regulation, and between protection for workers and flexibility (Datta, 2023). To achieve such measures, countries in the SEMED region could use the EU directive as an inspiration, while acknowledging differences in these socio-economic contexts.**

Due to the complexities involved in regulating platform work, the transformative shifts required in workers' status can be lengthy. In the interim, the majority of online and platform workers within the SEMED region find themselves without social or legal protection due to the informal nature of their work engagements. Consequently, **short-term initiatives could focus on expanding health and social benefits to those in atypical work arrangements.**

It is important to recognise that the pervasiveness of informality not only negatively impacts workers, but also places a strain on state budgets. Therefore, **shorter-term remedies aimed at countering widespread informality are essential.** Such measures could be executed through heightened scrutiny of on-location platforms' legal compliance, as well as heightened transparency in cross-border financial transactions.

One of the main issues faced by governments in regulating the platform economy is a lack of information about this type of work. Up-to-date data is necessary for evidence-based decision making. The irony is that because platform companies digitise the processing and storage of often real-time information, good data exists on all aspects of platform work, workers and clients (ETF, 2021d). However, the data is held privately by the platform companies and because they can be a commercialised asset, they are unlikely to be made publicly available<sup>28</sup>. While data and research are available for developed countries, these are not usually relevant to the contexts of developing countries. Thus, in order to benefit from and regulate the platform economy, countries need to set up **systems to monitor developments in platform work** – including strengthening their data collection capabilities, obliging platform companies to report a minimum level of information on their workers/clients (as comparable to traditional enterprise statistics collected by statistical offices), and developing better instruments for processing disaggregated data. Gathering relevant information on the platform economy could also empower governments to take a more active role in supporting employment within this sector.

In addition, workers in the SEMED region could benefit significantly from the introduction of **representative bodies** that would safeguard their interests. Although, in most cases, self-employed workers cannot form labour unions, other forms of associations or organisations could be formed. These representative bodies could enter into a dialogue with the government concerning the regulation of new forms of work. This would not only benefit workers, but also create a sense of solidarity among workers and raise public awareness about the challenges presented by these new forms of work.

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<sup>28</sup> In fact, digitalisation has made it possible to gather and process information and data in ways that were unthinkable in the past. The platforms which organise the online work between clients and workers have vast amounts of information/data on the nature of work performed by each worker. Big Data is indeed called 'the new oil' as a growing mass of exponential data is generated every day across the globe as a result of the increasing digitisation of processes, services, business, and personal and social interactions. There are increasingly more criticisms about the storage of vast amounts of personal data through apps, platforms and smart objects. Some call this 'data colonialism', designed to capture and translate our lives into data and extract information to change our behaviours. For more information, see Article 1 in ETF 2021d.



Workers might also need support **to transition to new forms of work**; this support may include reskilling or changing the ways in which workers find work and shape their career. **Public employment systems (PES)** can be utilised to support transition to new forms of work in several ways. PES can facilitate job matching and connecting individuals with emerging job opportunities, offer targeted training programmes to equip individuals with in-demand skills, and promote entrepreneurship or offer career guidance services.

Looking at the specificities of the SEMED region, online and platform work could be employed as a means to address some of the pressing issues that characterise the local labour markets in these countries – as long as certain important preconditions are met.

First, **youth unemployment** constitutes a significant challenge in most countries in the SEMED region, and platforms are perceived as potent instruments to offer alternative avenues for employment (Barry and Little, 2022). However, it is important to acknowledge that success on online labour platforms typically necessitates a foundation of prior education and work experience. Thus, **the policy focus should be on providing opportunities to gain experience and develop skills prior to entering online labour markets (Lehdonvirta and Albert, 2020)**. On-location platforms, in contrast, offer more available jobs with lower entry barriers, although these opportunities often lack stability and avenues for skill enhancement and career progression. Consequently, **policy initiatives should strike a balance between providing employment for young people and supporting them in developing relevant skills for lifelong employability**.

Second, online work holds significant potential to **empower women** by offering flexibility to those who wish to accommodate caregiving responsibilities at home. However, aside from Israel, the overall participation of women in the labour force across the region remains remarkably low. Our research confirms this trend also extends to these new forms of employment, highlighting a comparable underrepresentation of women in both online and on-location platform work. This phenomenon is often attributed to cultural factors, underscoring **the need for concerted policy efforts to cultivate a culture of female engagement within the digital economy (PwC, n.d.)**.

Lastly, this region also hosts millions of **refugees, many of whom lack employment and income**. Both the online and on-location platform economies offer avenues by which these populations can attain substantial benefits. While entering the on-location platform economy typically involves relatively accessible points of entry, and should be promoted among these groups, engaging with the online platform economy necessitates digital, domain-specific and language skills. Because refugees often lack these skills, **an appropriate policy response may be to prioritise skills development in addition to promoting platform work**. An exemplary case of such an initiative is Gaza Sky Geeks, which runs training bootcamps within refugee camps and serves as a promising model to emulate (CEDEFOP, 2020). As our research shows, Palestine has the highest number of online platform workers in the region per capita. This proliferation of platform work may have been enabled by such support programmes.

## Skills and human capital development

Skills development is of paramount importance in harnessing the potential of the platform economy. Notably, the skills required diverge significantly between online and on-location platform work. **While online platform work and freelancing necessitate a wide spectrum of skills that warrant comprehensive policy interventions, on-location work tends to be less skill-intensive**, reducing the need for extensive interventions. Consequently, this section primarily focuses on skills development for online work on and off digital platforms.

Numerous aspects of skills development can enhance online freelancers' and platform workers' prospects for success. These encompass **digital skills, domain-specific expertise, self-directed learning capabilities, linguistic proficiencies and business skills**. Furthermore, policy interventions must not merely aid freelancers in acquiring skills, but must also facilitate **the validation and showcasing of such proficiencies within online marketplaces (CEDEFOP, 2020)**. Achieving

these objectives entails fostering flexibility within educational and vocational systems, alongside targeted upskilling interventions. These elements are discussed in further detail below.

To begin with, **digital skills are essential for all online freelancing and platform work**, as they enable workers to proficiently navigate the digital tools that are indispensable to their tasks. Previous research has underscored the necessity of cultivating such skills prior to entering the realm of platform work, rather than during its course (Lehdonvirta and Albert, 2020). However, studies also conclude that the workforce in SEMED countries remains deficient in digital skills (Blom et al., 2020a). Addressing this challenge through policy interventions could encompass a wide array of solutions such as **national strategies, establishing industry councils, enhancing the curriculum, introducing new certification for digital competencies, and micro-credentials**. It is crucial to develop general digital skills within educational programmes, commencing from an early age. Curricula at various levels of primary and secondary education should encompass basic use of digital tools and basic programming, which is already the case in some SEMED countries. Simultaneously, there should be a concerted effort to upskill the existing workforce and the general population, including those who are economically inactive, through targeted initiatives (Blom et al., 2020b). Evaluating the prevailing levels of digital skills and identifying training gaps should revolve around established frameworks for digital competence, such as the widely used DigComp (Blom et al., 2020c; Misheva, 2021). Such measures would benefit workers in all sectors, and not just online freelancers. Potential examples of digital upskilling in the region that could be emulated include FWD scholarships in Egypt, government programmes for digital skills development in Morocco and Israel, and also programmes that provide skills to vulnerable and marginalised populations, such as Gaza Sky Geeks in Palestine and Knowledge Stations in Jordan (see the section on Skills and human capital development).

Beyond general digital skills and basic digital literacy, **online platform workers often require domain-specific knowledge**. While fields such as software development and writing usually require foundational skills acquired in educational institutions, platform and freelancing roles frequently demand highly specialised expertise that undergoes rapid changes. Consequently, it is necessary to continuously update such skills. In this regard, policy interventions should focus on **developing short and regularly updated upskilling programmes**. Insights from prior research and focus group discussions conducted for this study reveal that online workers regularly update their skills using online resources. However, focus group participants tended to gravitate towards concise tutorials that enable swift information retrieval (e.g. on platforms such as YouTube), as opposed to extensive and often basic massive open online courses (MOOCs), although the former sources provide no certification (CEFEDOP, 2020). One potential avenue for intervention involves forging partnerships between VET programmes and platforms, with the aim of developing brief online courses tailored to learners' needs that would also allow them to obtain micro-credentials (CEFEDOP, 2020). An example of this type of initiative is Mahara Tech in Egypt, which allows learners to complete courses for various tech career paths, including digital marketing and UX design, and to earn accredited certificates.

Crucially, while the demand for specific skills pertinent to online and platform work is changing, certain disparities exist within broader skills categories. For instance, software development is an exceptionally sought-after profession within the SEMED region, and also offers the highest average incomes. Accordingly, **policy efforts should be directed towards monitoring the supply and demand of skills**, with the goal of achieving a better match between skill supply and demand (CEFEDOP, 2020). Potential interventions could include the continuous tracking of skill trends through research initiatives or platforms such as the Online Labour Index<sup>29</sup>. These insights could then be integrated into targeted upskilling programmes. At the moment, no such initiatives can be found in the region.

Due to shifting skills demands within the market, **one of the most important proficiencies, essential to success in online freelancing and platform work, is self-regulated learning**. This encompasses a wide range of skills such as the ability to research and analyse changing skills

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<sup>29</sup> <http://onlinelabourobservatory.org>

requirements, to actively request feedback, and to be able to assess and adapt one's learning strategies. These independent learning competencies empower individuals to continuously acquire new skills. Most of the freelancers who participated in focus groups as part of this study highlighted the fact that they worked in areas that are different from their educational profiles, and that the tasks they carry out change constantly. However, it is important that necessary learning competencies are acquired in early education, as their absence can exert adverse effects on an individual's early career trajectory (CEFEDOP, 2020). Because the educational systems in most SEMED countries are fairly rigid, **policy interventions should focus on developing autonomous learning competencies as early as the level of primary education.** Classroom settings provide an opportune environment to instil such competencies, with a targeted emphasis on techniques such as devising plans and prioritising learning objectives, along with the autonomous use of specific learning tools. Equally critical is fostering autonomy in learning across various subjects, including independent experimentation, with support from educators (CEFEDOP, 2020).

Beyond digital and domain-specific proficiencies, **the role of language and communication is crucial to securing jobs on online digital platforms.** These are also key competences for lifelong learning (European Commission, n.d.). Our research underscores that while workers often use Arabic-language platforms, they still predominantly gravitate towards English-language platforms, primarily due to the possibility of higher earnings. Thus, to fully harness the benefits of online platform economy, workers should be equipped with a solid knowledge of the English language. However, the available data suggests that English proficiency in SEMED countries ranks among the lowest globally (EF, 2023). Accordingly, **policy initiatives should seek to increase the coverage and quality of English language courses within both educational and vocational curricula.** Moreover, English courses could also benefit the **broader adult population, and in particular, marginalised social groups** such as refugees.

Online and platform workers function as independent contractors, responsible for sourcing their own work, shaping their own career trajectories, and navigating legal responsibilities. To achieve this, **entrepreneurial and skills are vital (CEFEDOP, 2020).** Focus group participants indicated that they constantly need to search for work and market themselves, maintain good relationships with clients and manage their careers, but also navigate a large number of tasks at the same time, including fulfilling legal obligations – all of which requires entrepreneurial skills. **A policy focus on the provision of entrepreneurial training stands to significantly enhance workers' prospects.** Youth entrepreneurship programmes could offer invaluable guidance, nurturing the development of personalised career paths and cultivating specific proficiencies such as decision making, adaptability and innovation. Activities such as simulating the establishment of mini-enterprises could significantly improve individuals' capabilities to work as self-employed. Furthermore, comprehensive freelancing guides could illuminate the benefits and downsides of online and platform work, thus helping young people make informed career choices.

Lastly, online freelancers and platform workers not only have to acquire the skills necessary for platform work; they must also showcase them effectively to potential clients. Previous research and focus groups conducted for this study show that **signalling one's skills to employers is one of the main challenges in these highly competitive online labour markets.** The biggest challenge identified in this regard is securing employment without previous client feedback on the platforms – a critical mechanism for signalling competence and reliability. To address this issue, policymakers could adopt various types of initiatives. First, **policymakers could foster collaboration with platform entities to craft experimental micro-internships.** Such initiatives could involve offering clients a subsidised rate when engaging workers without prior platform-based experience. In return, clients would provide both public and private feedback to freelancers. Alternatively, **policymakers could initiate public portfolio-based systems.** Such systems would enable workers to exhibit and promote substantiated evidence of their qualifications, skills and platform-related experience not only across diverse platforms, but also beyond them. Individual online accounts would thus provide a comprehensive overview of a worker's portfolio and credentials. Importantly, platforms should also be incentivised to use such external portfolio systems. However, similar initiatives have already been

tested and their effect on workers' success remains inconclusive, underscoring the need for their cautious implementation (CEFEDOP, 2020). Signalling an individual's skills and experience to employers outside the platform context appears equally challenging for freelancers in the SEMED region. Freelancers indicate that a freelance career is usually not regarded as an asset in the labour market; public portfolio-based systems might therefore provide convincing comprehensive evidence of skills to employers.

## Digitalisation

The expansion of platform work relies heavily on the development of a comprehensive digital ecosystem. Therefore, **policies targeting the enhancement of digital infrastructure, internet-based payment systems, e-government initiatives and the digital transformation of the private sector are indispensable for nurturing the growth of both online and on-location platform work.**

**To foster both on-location and online platform work, robust ICT infrastructure is crucial.** This includes widespread access to high-speed internet connectivity, and the availability of necessary hardware equipment. As outlined in the section on Internet and digitalisation, the region struggles in particular with expanding internet access to rural communities and refugee populations, effectively limiting their engagement in the digital economy. Furthermore, a substantial portion of the population faces challenges stemming from the scarcity of essential hardware, particularly computers, which are necessary for participating in online freelancing and platform work. Thus, **policy initiatives should focus on promoting equitable access to infrastructure** (PwC, n.d.). Strategies such as the establishment of technology centres or publicly supported co-working spaces could play a pivotal role in ensuring both internet accessibility and the provision of the requisite equipment.

Given that a significant proportion of online platform workers in the SEMED region engage with international platforms, **access to viable international payment systems constitutes a basic prerequisite for facilitating online work on and off digital platforms.** Our research shows that this issue significantly affects online freelancers in countries such as Libya, Palestine and Lebanon. Consequently, **policy initiatives in these countries should be directed towards advocating for better access to international payment systems.**

A broader digital transformation of the private sector could enhance skills development and the employability of online and platform workers. To achieve this, **collaboration between the government and the private sector is indispensable.** Supporting the private sector's digitalisation efforts and the growth of the ICT sector, alongside exploring prospects for public-private partnerships, presents significant potential for broadening the digital transformation. The private sector should be empowered and incentivised to contribute to innovations and to scale them up for maximum impact (Murthi, 2021).

Lastly, countries in the SEMED region could benefit greatly from regional cooperation in the exchange of information and practices relating to these new forms of work. This could include the exchange of information on trends in the platform economy, practices in regulating employment relations, skills development initiatives, and so on. While this argument does not stem directly from our research, we believe that collaboration such as that seen at EU level would greatly assist in harnessing the benefits and minimising the risks associated with these new forms of work. We are, however, aware that such cooperation would be difficult at the present time due to the political and security situation in the SEMED region.

## Concluding remarks

This is the first comprehensive study on new forms of work in the SEMED region. As such, it forms a foundation for further research and provides important input for policymaking in the region. Moreover, by having a study with the same methodology in four different regions (namely, SEMED, Central Asia (upcoming), Eastern Partnership and Western Balkans), there are opportunities for cross-regional comparison and identifying similarities and differences in work practices across regions and countries (ETF, 2021c; ETF, 2022b).

By mapping the landscape of these new forms of work, this study aims to inform policymakers about: the growing number of platform workers in the region; the main online labour platforms and their business models; workers' motivations for engaging in these forms of work; the distribution of workers' occupations, educational profiles and gender; workers' remuneration, employment status and in-work conditions; skills requirements and skills development opportunities for workers. Furthermore, this report informs policymakers about current regulations, policies and strategic approaches to the new forms of work in terms of the labour market and employment, skills and human capital development, and digitalisation.

Ultimately, this report presents a mixed account of the strengths, weaknesses, opportunities and threats in relation to these new forms of work in SEMED region. To maximise the potential benefits and minimise the potential risks identified by this research, the report proposes the groups of policy actions set out below to be taken.

- There is an urgent need to correctly determine and enforce the legal status of online workers on and off digital platforms and on-location platform workers in the region. This would provide a foundation for defining the rights and obligations of these workers and the platforms they work for, thereby safeguarding workers' rights and countering the informal economy. At the same time, policymakers should facilitate the development of bodies to represent these workers, in dialogue with local policymakers, as well as with platforms and clients. Furthermore, the new forms of work explored in this report can be used by policymakers to mitigate some of the persistent issues that plague local labour markets in the SEMED region, such as low levels of labour market activity among women, young people, refugees and rural populations. To better regulate and benefit from these new forms of work, it is crucial to continuously research and monitor them, and to address the current lack of data available to policymakers in the region on this evolving phenomenon.
- The increase in new forms of work necessitates policies relating to the development of the skills needed for them, and policies on the recognition and transferability of such skills. These policies should be aimed at developing digital skills, domain-specific skills, language skills, self-regulatory learning skills and various entrepreneurial skills. At the same time, policies should address the recognition of skills and how workers can signal effectively their possession of skills both on digital platforms and outside them. This could include the development of relevant upskilling initiatives that offer micro-credentials.
- Lastly, to maximise the benefits obtained from these emerging forms of work, policymakers in the region should work on ensuring that there is a sufficient degree of digitalisation. This means that policies should aim to improve existing internet infrastructure, increase access to international payment systems, and further facilitate the digitalisation of the private sector.



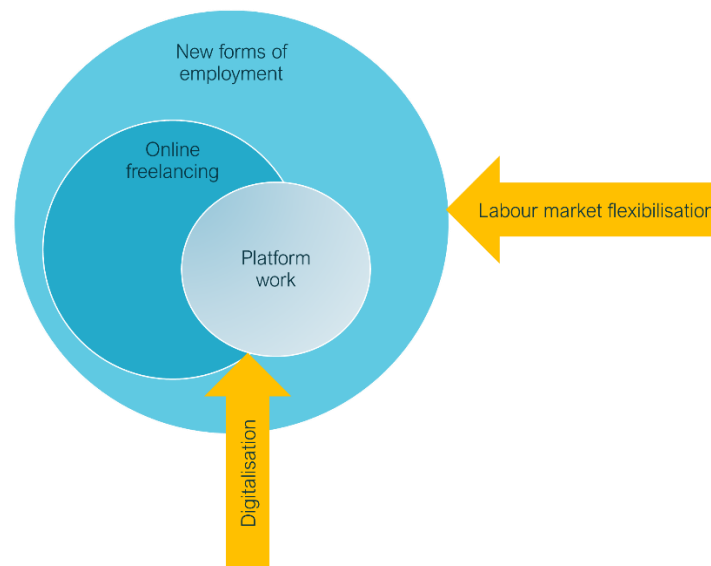
## Annex 1. Conceptualisation of platform work and online freelancing

The main concepts involved in the present study are online work / online freelancing and work through digital labour platforms (i.e. platform work). Both platform work and online freelancing can be understood as new forms of employment – in the sense that they diverge from the traditional subordinate employment relationship between an employee and a single employer, which involves stable work schedules and places (these are the relationships on the basis of which labour regulation in most countries has for a long time been developed). However, what distinguishes platform work and online freelancing from other forms of work driven by labour market flexibilisation is their heavier emphasis on the aspect of digitalisation. Namely, the digitalisation of societies and economies has enabled online freelancing and platform work as feasible ways to earn a living.

In some cases, online freelancing can be seen as a broader category, covering platform work. This is especially applicable to the provision of professional services through such platforms as Upwork, Freelancer.com or similar. However, not all forms of platform work can be classified as online freelancing. On the one hand, some of this work is not implemented *online*, but rather *on-location* (e.g. cleaning or repair work by workers who are recruited by clients through platforms). On the other hand, not all platform work can be classified as *freelancing*: EU policymakers have already taken steps to review the labour market classification of ride-hailing drivers and delivery couriers, who are in a de facto subordinate relationship with the platforms on which they operate (EUR-Lex, 2021). In some Eastern Partnership countries and Western Balkan regions analysed in previous studies, it was found that driving or delivery workers tended to be employed by the platform companies.

The relationship between the various concepts involved in this study is illustrated in figure below.

**Figure 27. Main concepts of the study**



Online freelancing can thus be broadly defined as **independent work** outside of an employment relationship that **does not involve a commitment** by the worker to a particular client for a long term. Online freelancers **work remotely** and find work through various channels such as websites, social media, digital platforms, personal connections, agencies and professional associations. Online freelancers mostly provide services of a high level of complexity that require specific qualifications, although this is not always the case.



Specifically, **platform work** refers to work intermediated by **digital labour platforms** – internet-based companies that intermediate and organise work, provided by workers or self-employed people, to third-party clients. This is a very specific business model, which intermediates labour and monetary transactions, and charges commission fees on these transactions<sup>30</sup>.

**Platform workers**, meanwhile, are individuals who provide services that are intermediated via digital labour platforms, regardless of the legal employment status of these individuals (worker, self-employed or any third-category status).

Platform work is a very heterogeneous phenomenon. **Several dimensions** allow us to further classify and systematise the variety that exists within platform work. First, **two broad types of platform work** exist (see the table below for examples), based on whether the workers can work online remotely, or have to meet the client or go to a specific physical location in order to implement the task:

- **Web-based remote services:** remote delivery of electronically transmittable services (e.g. via freelance marketplaces). These are also referred to, in various sources, as ‘cloud work’, ‘crowd work’, ‘online freelancing’, ‘remote platform work’ or ‘global-reach platform work’ (Duggan, 2019; Popiel, 2017; World Economic Forum, 2020).
- **On-location services:** here, the delivery of services is physical, although administrative services and matching customers with service providers are digital (e.g. transportation, cleaning or delivery services). These are also referred to in various studies as ‘app work’, ‘location-based digital labour’ or ‘mobile labour markets’ (Duggan, 2019; Schmidt, 2017).

**Table 67. Main types of tasks conducted by platform workers**

	Online	On-location
High-skill	<p>Online professional services (e.g. accounting, legal, teaching, consultations, project management or similar)</p> <p>Online creative and multimedia work (e.g. animation, graphic design, photo editing or similar)</p> <p>Online sales and marketing support work (e.g. lead generation, posting ads, social media management, search engine optimisation or similar)</p> <p>Online software development and technology work (e.g. data science, game development, mobile development or similar)</p> <p>Online writing and translation work (e.g. article writing, copywriting, proofreading, translation or similar)</p>	<p>Construction and repair services</p> <p>At-home beauty services</p> <p>On-demand sports and health services</p> <p>On-demand photography services</p> <p>On-demand teaching and counselling services</p> <p>Tourism and gastronomy services</p>
Low-skill	<p>Online clerical and data-entry tasks (e.g. customer services, data entry, transcription)</p> <p>Online micro tasks (e.g. object classification, tagging, content review, website feedback or similar).</p>	<p>Transportation services (e.g. services similar to taxi, moving)</p> <p>Delivery services (e.g. courier and food delivery services, grocery delivery)</p> <p>Housekeeping and other home services</p> <p>On-demand pet care services (e.g. dog walking)</p> <p>On-demand childcare and elderly care services</p>

Second, **skills levels and the complexity of tasks** vary greatly. Although on-location platform work is more often associated with lower skills than online platform work, this is not necessarily true in all cases. While the latter can involve carrying out low-complexity tasks that do not require any additional skills besides basic digital literacy, on-location work can also involve high-complexity tasks, such as teaching, consultancy or similar. **Please note that skills-related questions will be the most important underlying theme of the country reports.**

<sup>30</sup> It is very important not to confuse digital labour platforms with similar concepts, sometimes referred to using similar terms; for example websites posting job advertisements by companies who are looking for employees, or digital tools used for work (such as Microsoft Teams or Zoom) are sometimes called platforms, but they are not ‘digital labour platforms’ in the sense in which this term is used in this study.

Importantly, the following related activities were not considered within the scope of this study:

- **Remote work for a company by which a worker is employed:** the fact that work is conducted online does not automatically mean that it is 'platform work'. In the specific case of a platform work relationship, the platform should operate as an intermediary between workers and their clients.
- Income generated using platforms, **where capital – not labour** – is the key factor in income generation. For example, Airbnb hosts rent out their real estate, and on eBay, users can generate income by selling products. Other platforms exist that allow users to lend money and generate interest, and so on.

## Annex 2. Methodology

In this annex, we present the methodology of this study. The main elements of the methodology are desk research and literature review, stakeholder interviews, automated data collection from the web and focus group discussions. Research on **on-location platform work** mainly relied on data collected through desk research, literature review and interviews with stakeholders, including on-location platform representatives and experts in on-location platform work. Research on **online platform work** was complemented by the automated collection of data from platform websites and focus group discussions with online freelancers, in addition to desk research and interviews.

### Desk research and literature review

Desk research carried out in the national languages of the countries under analysis and in English was the initial step in the data collection process. Desk research included:

- **Primary sources**, such as statistics, policy and legal documents, platform websites, official statistics, specific regulations, court rulings, project reports, etc.
- **Secondary sources**, such as literature reviews, research papers, studies exploring platform work and its challenges, news articles, etc.

As part of the desk research, the researchers explored available information in the national languages by identifying key terms. For example, English concepts such as 'freelance work', 'online work', 'platform work', 'freelancing/freelancer', 'online platforms', 'on-location platforms', 'gig work' were translated and used to guide the research in Arabic, French and Hebrew. The table below provides a list of the main keywords in English.

**Table 8. Initial search keywords**

Topic	Keywords
Online and platform work	gig work/economy, freelancing, online work/labour, digital work/employment, food-delivery services, taxi app services, web-based work, temporary gigs, platform economy/work, freelance jobs/work, online labour platforms, digital labour platforms, on-location platforms, [specific platform names]
Strategic and policy approaches	active labour market policies, youth policies, youth guarantee, youth employment policy, employment policy, digital skills policy, digital skills project, digital infrastructure
Horizontal aspects	young people, school to work transitions, digital skills, digital competencies

### Analysis of platform websites

One of the key methods used for desk research was the **review and analysis of specific platforms**. First, the labour platforms that were the most popular in each SEMED country were identified. Researchers then reviewed their interface, worker registration process and requirements, and terms and conditions.

### Exploratory analysis of online non-platform freelancing

Some online freelancers work outside of platforms. They work online for one or more clients, but are not in an employment relationship. Researching these freelancers is difficult, due to the informal nature of this work and the lack of available data. Because of this, only an exploratory analysis was conducted on these individuals. The researchers enquired as to where and how online freelancers find work. Online job search portals (specifically, job offers for remote work and foreign companies), social

media groups (e.g. Facebook groups for freelancers) and blog posts/promotional websites targeting freelancers<sup>31</sup> were the key data sources for desk research on this topic.

## Interviews

In total, 53 interviews were conducted, representing the following stakeholder groups in the nine SEMED countries studied:

- Policymakers (e.g. representatives of ministries of labour or digitalisation).
- Representatives of the most prominent digital labour platforms.
- Experts or researchers who have analysed atypical work, new forms of work or platform work in the region.
- Representatives of online/platform workers identified through social media groups and digital labour platforms.
- Social partners or NGOs (e.g. trade unions, IT sector associations).

In addition, an interview was conducted with representative of Upwork about platform work trends in the SEMED region.

The table below summarises the number of interviews per country.

**Table 9. The number of interviews per country**

Country	Number of interviews
Algeria	7
Egypt	5
Israel	5
Jordan	10
Lebanon	5
Libya	7
Morocco	5
Palestine	5
Tunisia	3

<sup>31</sup> For example, see: <https://www.remotepass.com/blog/all-you-need-to-know-about-working-as-an-independent-contractor-in-egypt>

## Automated collection of data from the web

The insights from desk research and interviews were supplemented with data from three relevant online labour platforms used to provide web-based services: **Guru.com, PeoplePerHour and Freelancer.com**. This selection was influenced by several factors. First, these are international websites that have notable numbers of workers from all of the SEMED economies, and could be filtered by location. Second, these platforms are not specialised and offer a variety of jobs, requiring a variety of skills and qualifications (as opposed, for example, to platforms focusing specifically on designers, programmers or translators, etc.). Third, the websites of these platforms display the information in a way that is especially convenient for data scraping (e.g. they provide skills and hourly rate data in search results, while other platforms do not), thus allowing comparative data to be gathered in relatively short amount of time.

To collect the data, we filtered all the freelancers available on the three selected platforms (Freelancer.com, Guru.com and PeoplePerHour) by country of interest. The search results that were scraped were presented as brief platform worker profiles. Each platform was scraped and further analysed as a separate dataset. This was because the information provided on each platform was not identical in its form, and therefore the datasets could not instantly be merged without losing important information; this method also avoided duplications. In order to undertake regional and cross-platform analysis, the comparative information was compiled into a single dataset covering all three platforms.

Once scraped, the data was cleaned of duplicates (those resulting from data collection activities, as well as duplicated profiles present on the platforms based on their descriptions). It is important to note, however, that the actual number of workers could differ from the number of observations in the dataset, because the same person could have an account on multiple platforms, or some accounts could be used by more than one freelancer. The data was then coded to enable more detailed analysis. The key coding efforts were directed at developing the new variables detailed below.

- **Occupation.** One of six occupations was ascribed to each platform worker using the same classification applied by the iLabour Project (see the table below), which is also in line with the study's conceptual framework (Kassi, 2016). To ascribe specific occupations to each platform worker, we used keyword information from the 'tags' provided in the 'skills' section on Freelancer.com, Guru.com and PeoplePerHour. We assigned a list of keywords to each occupation (see the figure below). This list was significantly expanded through several iterations, using both a sorting algorithm in Python and manual classification. The final list included around 1 200 skills. We then used an algorithm that checked for correspondence between each profile skill and skills from a list for each occupation. In instances where a profile had skills corresponding to more than one occupation from the list, the code was drafted in such a way as to ensure that the dominant occupation would prevail. This meant that if a person had three skills in the field of software development and technology and one in creative and multimedia, the occupation assigned would be software development and technology. Some profiles did not list any skills; in these cases, they were not assigned an occupation. In cases where a profile had equal number of skills from two different occupations, we assigned it randomly to one or the other category. Because the sample is very large, we expect minimal biases from this method. Lastly, we counted the number of skills from different occupations with which the skills of individual profiles matched to determine the number of occupations per worker.

**Table 10. Coding of occupations<sup>32</sup>**

Occupation	Examples of coding keywords
Clerical and data entry	Customer Service, Data Entry, Transcription, Excel, Web Search, Customer Support, Call Center, Account management, Typing, Word, Procurement, Event Planning, Virtual Assistant, PowerPoint, Microsoft Office, PDF, Administrative Support
Creative and multimedia	Animation, Graphic Design, Photography, Audio, Logo, Infographics, User Interface, Photoshop, Design, Illustration, Logo, Illustrator, Art, Artist, Cartoon, Caricature, 3D, CATIA, AutoCAD, Crafts, Drawing, Painting, Video, Music, Cinema, Voice, CorelDraw, Solidworks, Graphics, Cinematography, Adobe Lightroom, Adobe Premiere Pro, Comics, Visualization, Photo, Rendering, Sketching, CAD/CAM, After Effects, 4D, Singing, Acting, Sound Design, Adobe Flash, GIMP, Animate, Vynod, Creative, UX/UI, UI, UX, Vocals, Piano, Retouching
Professional services	Accounting, Legal, Project Management, Building Architecture, Mechanical Engineering, Chemical Engineering, Audit, Metatrader, Finance, Business Analysis, Business Plan, Tutoring, Market Research, Power BI, Electronics, Statistics, Business Intelligence, Medicine, Medical, Data Analytics, Business Analytics, Consulting, Psychology, Coaching, MATLAB, Human Resources, Teaching, Lecturing, Genealogy, Electrical Engineering, Biotechnology, Attorney, Academic, Mathematics, Physics, Tableau, Trading, Civil Engineering, Aerospace, Law, Dynamic 365, Geotechnical, Patent, Strategy, Atlassian, Financial, Jira, Recruitment, Account Payables Management, A/R Management, Revit, Nintex, Autodesk, Risk Management, Planning, Microsoft Project, Cryptocurrency, SPSS, Research, Management Skills, Epidemiology, Team Management, Project Documentation, Budget Planning, Scrum, Product Management, Project Plan, Business Case
Sales and marketing support	Lead Generation, Advertising, SEO, Marketing, Facebook, Sales, Telemarketing, CMS, Classifieds Posting, Google AdWords, Instagram, CRM, TikTok, Shopify, Branding, eCommerce, Reviews, Amazon, eBay, Alibaba, Conversion Rate, YouTube, Buyer Sourcing, Prestashop, Google, Sales, Advertisement, Social Media
Software development and technology	Automation, Data Science, Programming, Mobile, Development, Software, AI, Python, PHP, Java, CSS, HTML, C++, Programming, Scraping, .NET, AJAX, Linux, Developer, Android, Apple, Geolocation, AngularJS, WordPress, Node.js, Computer Science, PHP, Joomla, Computer, Database, Robotics, Game Development, Azure, LabVIEW, Scrip, UNIX, MySQL, Technical Support, Network, iPhone, DNS, Security, Machine Learning, Cloud, Cisco, ASP, DevOps, Xamarin, Magento, Drupal, Bootstrap, Selenium, Microsoft Access, Debugging, Telecom, Data Mining, Data Extraction, Technology, Windows, Testing, Clojure, CUDA, SCADA, Vectorization, Informatica, IoT, iPad, Bluetooth, Angular, Apache, SDL, Data Management, Digital Asset Management, Data Migration, MSI, Virtual Reality, Worldbuilding, Gaming
Writing and translation	Writer, Article, Writing, Copywriting, Translation, Editing, Proofreading, Grammar, Spelling, English, Polish, German, Lithuanian, Spanish, Danish, Dutch, French, Italian, Romanian, Turkish, Russian, Slogans, Portuguese, Greek, Arabic, Czech, Hungarian, Norwegian, Japanese, Chinese, Hindi, Blog, Estonian, Subtitles
Blank	Keywords belonging to too many different occupations, thus making it unable to indicate which is the dominant profession / unclear descriptions

- Gender.** Determining gender from personal names was more challenging in the SEMED region than in previous reports. The main reason for this is that creating a simple algorithm that would sort the names according to suffixes was not possible for latinised Arabic names in combination with names of other origin (French, Hebrew, Berber, and so on). One option to solve this issue was to use name databases with defined genders corresponding to names. However, freely available name databases were not exhaustive enough as they did not contain all name variations. The approach we chose was to use a machine learning package that could classify names according to gender. First, we used the Python package Gender Guesser.<sup>33</sup> This is based on large online

<sup>32</sup> This initial list was significantly expanded through the automatic and manual classification of skills found in worker profiles.

<sup>33</sup> <https://pypi.org/project/gender-guesser/>



databases of names, as well as statistical inference. The output it produces contains six values: male, female, mostly male, mostly female, unisex, and unknown. This procedure classified around two-thirds of the names, while the rest were categorised as unknown. An additional problem was encountered with names extracted from Guru.com. Unlike Freelancer and PeoplePerHour, the name formats on Guru are not structured (first name + initial of the last name). Instead, it uses an open format in which users can write anything. Because of this, it was particularly challenging to infer the first names from this field. To solve this issue, we used another Python machine learning package called Nameparser<sup>34</sup>. This extracts first names from unstructured text. After applying this method and running the Gender Guesser machine learning algorithm, we achieved a comparable level of classification to that of two other platforms, around two-thirds. Although this method is not error-proof, the similar classification rate indicates that the quality of the first names extracted is satisfactory. Lastly, we made a list of the remaining one-third of unsorted names and sorted them by frequency. We then used the online commercial software Gender API<sup>35</sup> to sort the remaining names. We did not sort all of the names, as those occurring less frequently included a lot of nicknames, company names and incomprehensible text. Thus, we classified only those names that appeared at least five times. In the end, we managed to classify around four-fifths of all names.

- **Activity.** In general, many workers who register on web-based work platforms never manage to secure work assignments. We therefore used an indicator based on the number of reviews or completed projects to understand the activity rates of platform workers. More specifically, we classified workers as active if: 1) they had a review/feedback (meaning that they had completed at least one task via the platform and had been assessed by their clients); 2) if the number of completed projects was more than 0. In the case of Hubstaff Talent, which does not provide either, we assumed those with hourly rates to be active.

## Focus group discussions

Focus group discussions (FGDs) were primarily aimed at covering the first key research topic: new trends in work organisation, skills demand and skills development. These discussions aimed to understand participants' perspectives towards such work arrangements, skills development and career prospects. In total, four focus groups were conducted in English, involving freelancers from eight countries in the SEMED region (see the table below)<sup>36</sup>.

**Table 11. Number of focus group participants per country**

Country	Number of participants
Algeria	1
Egypt	3
Israel	1
Jordan	1
Lebanon	5

<sup>34</sup> <https://nameparser.readthedocs.io/en/latest/>

<sup>35</sup> <https://gender-api.com/>

<sup>36</sup> No freelancers could be recruited from Libya.

Country	Number of participants
Libya	0
Morocco	1
Palestine	2
Tunisia	2

Each focus group included 1-4 Upwork freelancers with different occupational backgrounds. Upwork was chosen because it is the most widely used online labour platform in the SEMED region, and it was not included in the web scraping due to technical limitations. In this way, the focus groups were used to compensate for the lack of data from this platform. Participants were recruited through a job post on Upwork, and were remunerated for their participation. The following criteria were considered to ensure an optimally diverse set of participants in each FGD:

- a. participants spoke English fluently;
- b. participants represented different occupational profiles;
- c. participants represented different SEMED countries; and
- d. participants had different backgrounds and experiences (e.g. in terms of age, gender, education, the SEMED country in which they live, how long they had been working through platforms, etc.). Interactions between participants of different ages, with different views and experiences, allowed the researchers to gather better insights on the inherent biases of participants.

In preparation for the focus groups, when carrying them out, and when analysing and presenting the results, the research team duly adhered to the relevant **ethical criteria**. After each focus group, the researchers prepared **detailed notes** that were used in the further **analysis**.

## List of abbreviations

CEO	Chief executive officer
EFE	Education for employment
ETF	European Training Foundation
EU	European Union
EUR	Euro
FWD	Future Work is Digital
GDP	Gross domestic product
ICT	Information and communication technology
ILO	International Labour Organization
IOM	International Organization for Migration
ISSF	Innovative Startups and SMEs Fund
KIESE	Key indicators on education, skills and employment
MENA	Middle East and North Africa
MoDEE	Ministry of Digital Economy and Entrepreneurship of Jordan
MOOCs	Massive open online courses
NEET	Not in education, employment or training
NRI	Network Readiness Index
OLI	Online Labour Index
PES	Public employment services
PISA	Programme for International Student Assessment
PPMI	Public Policy and Management Institute

PwC	PricewaterhouseCoopers
SAP	System analysis program
SEMED	Southern and Eastern Mediterranean
SWOT	Strengths, weaknesses, opportunities and threats
UAE	United Arab Emirates
UNHCR	United Nations High Commissioner for Refugees
US	United States
USD	United States dollar
VET	Vocational education and training

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