International Labour Review, Vol. 162 (2023), No. 1

Digital platforms and the changing freelance workforce in the Russian Federation: A ten-year perspective

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Abstract. *This article traces the development of the online labour market in the Russian Federation and across the wider post-Soviet space. The authors draw on the unique data of four waves of an online survey for 2009, 2011, 2014 and 2019 on the leading Russian-speaking general-purpose platform for creative and knowledge-based work. The results shed light on key trends, such as spatial decentralization, occupational diversification, feminization, maturing, rising educational attainment and educational mismatch, the consolidation of freelance careers, platformization and legalization. The article discusses these findings and their potential policy implications for the future development of online platform work in the Russian Federation.*

Keywords: *gig economy, digital labour platforms, non-standard employment, self-employment, freelancers, Russian Federation.*

1. Introduction

The progressive development of information and communications technology (ICT) has fundamentally and unforeseeably changed the employment landscape (Cherry 2020). Digital platforms mediating short-term on-demand work have mushroomed (Vallas and Schor 2020; Codagnone, Karatzogianni and Matthews 2019). The pioneers in the digitalization of labour markets were websites dedicated to remote, online work that came into existence around the turn of the millennium. In the literature, these websites are variously referred to as "online labour platforms" (Kässi and Lehdonvirta 2018; Graham, Hjorth and Lehdonvirta 2017), "crowdwork platforms" (Howcroft and Bergvall-Kåreborn 2019; De Stefano 2015), "freelance online marketplaces" (Aguinis and Lawal 2013; Shevchuk and Strebkov 2018) and "online labour markets" (Agrawal et al. 2015; Hong and

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This article is also available in French, in *Revue internationale du Travail* 162 (1), and Spanish, in *Revista Internacional del Trabajo* 142 (1).

Pavlou 2013). In this article, we use the term “online labour markets” to describe the new economic model and whole labour markets, distinguishing them from “online platforms” (particular websites). Online labour markets represent a distinct segment of the wider gig economy, which, in contrast to localized gig work performed in person (such as taxi driving, delivery, handiwork and cleaning), concerns work that can be delivered electronically (De Stefano 2015). Within online labour markets, an important distinction is made between “microwork” or “piecework” platforms – offering low-skilled repetitive tasks, such as entering data, classifying images and transcribing texts – and “freelance” platforms – involving more creative and knowledge-based work by software developers, graphic designers, writers, consultants, and so on (Berg et al. 2018; Kässi and Lehdonvirta 2018; ILO 2021). This article explores the latter type of platform.

Although identifying the employment status of workers in the localized gig economy is a much-discussed problem, in the case of online labour markets, workers typically appear as autonomous service providers, referred to variously as “freelancers”, “independent contractors”, “contract professionals” and “consultants” (Cappelli and Keller 2013). Narratives about them diverge, ranging from conceptions of such workers as entrepreneurial “free agents” (Malone and Laubacher 1998; Pink 2001; Sundararajan 2016) to precarious “logged labour” (Gandini 2019; Huws 2016). These controversies are often ideologically charged and insufficiently grounded empirically (Codagnone, Karatzogianni and Matthews 2019). Observers routinely refer to the mythical figure of the (average) platform worker, although the landscape of platform employment is extremely diverse and insufficiently studied.

The lack of very basic data has generated demand for descriptive research seeking to answer seemingly simple questions. Who are online platform workers? What are their demographic and occupational characteristics? To what extent does the profile of online workers vary by country? (Berg et al. 2018; Eurofound 2018; Huws et al. 2019; Piasna and Drahokoupil 2019; Pesole et al. 2018; ILO 2021). And as online labour markets gather momentum, new questions arise, such as how did these characteristics evolve? In other words, what are the demographic and compositional changes in the online freelance workforce? Filling this gap in the data requires the monitoring of key indicators over a number of years using a common methodology. Such research can shed light on the dynamics and future of online platform work, as well as informing social and legislative initiatives.

Scholars currently tend to focus primarily on global English-language platforms and on the North–South dimension of online work, virtually ignoring important developments in other parts of the world that fall outside these distinctions (Kässi and Lehdonvirta 2018; Agrawal et al. 2015). However, densely populated online labour markets exist in other languages (such as Chinese, Spanish and Arabic), reflecting the complex nature of globalization (Kuek et al. 2015). Researching non-English-language platforms and online labour markets can help identify general traits and specific patterns of work in the online gig economy.

Our study addresses these gaps, focusing on freelance platform work in the Russian Federation and the wider post-Soviet space. The geographical reach of the Russian language has facilitated the development of a large online labour market, which includes not only Russian citizens but also people from Soviet Union successor States and Russian speakers further afield (Shevchuk and Strebkov 2015). This landscape is defined by the specific historical roots and economic and cultural context, as well as the societal impact of self-employment and platform work in these post-Soviet countries (Aleksynska, Bastrakova and Kharchenko 2018; Gerber 2004; Chepurenko 2015; Aleksynska 2021). This study draws on unique data from four waves of an online survey that were conducted by the authors in 2009, 2011, 2014 and 2019 through the leading general-purpose platform for creative and knowledge-based work operating in the Russian language. The common methodology applied to collect and analyse data in these waves provides an opportunity to shed light on the key demographic and compositional changes in the Russian-speaking online freelance workforce over a period of ten years. Overall, our results point to spatial decentralization, occupational diversification, feminization, maturing, the increasing educational attainment of suppliers and a subsequent educational mismatch, a consolidation of freelance careers, the increased importance of platforms and a subtle trend towards the legalization of largely informal online platform work. This new empirical evidence can contribute to mapping the new world of freelance and platform work and encourage further studies in this area.

The remainder of this article is organized as follows. The second section provides an overview of the rise of freelance work in the Russian Federation and the post-Soviet space, tracing the development of the Russian-language online labour market and freelance platforms. The third section discusses the methodological challenges posed by quantitative research on the subpopulation of online freelancers, and presents the methodology and data collected on the Russian-speaking online freelance platforms. The fourth section explores the trends identified in the survey results, and the final section presents our conclusions.

2. The rise of the Russian-language online labour market

2.1. The post-Soviet context of freelance work

Over the past two decades, freelance work through online platforms has emerged as a new phenomenon and has gradually become a distinct feature of the Russian labour market. Both remote work based on ICT and self-employment constitute innovative forms of employment in the post-Soviet context. Under the centrally planned Soviet economy, all citizens were supposed to work for state-owned enterprises, rather than for themselves. Independent work and private entrepreneurship were illegal. It was only in tiny niches of agriculture, construction, home care and tutoring that households (but not firms) could carry out informal and part-time work to supplement their main income. In other countries, such as Hungary and Poland, which permitted limited forms of private economic activity during their shorter socialist periods, entrepreneurial values and practices managed to survive and were mobilized during the market transition (Róbert and Bukodi 2000; Szelényi 1988; Chepurenko 2015). In contrast, in the contemporary Russian Federation, and other post-Soviet countries, there is no recourse to strong and long-lasting traditions of independent work.

The legalization of self-employment and private entrepreneurship in the late 1980s did not automatically lead to a large share of the Russian population becoming engaged in small businesses and freelancing. Productive entrepreneurship and the overall entrepreneurial spirit in the country are still quite weak (Chepurenko 2015). The Russian Federation has lower rates of self-employment than those found in most developed and developing market economies: own-account workers without employees constitute around 5–6 per cent of the labour force, and all self-employed workers (including employers and contributing family workers) account for around 7–8 per cent.[1] Among the countries observed by the Global Entrepreneurship Monitor, the Russian Federation continues to have one of the lowest levels of entrepreneurial intentions, early-stage entrepreneurial activity and established business ownership (Bosma and Kelley 2019; Estrin and Mickiewicz 2011). However, self-employed workers in the Russian Federation represented a rare group of "winners" in terms of material and subjective well-being in the market transition process (Gerber 2004). We conclude that online freelancing is an uncommon and successful example of a bottom-up private initiative, based on ICT and human capital. In contrast, most self-employed workers in the Russian Federation are still engaged in traditional sectors and semi-skilled labour.

The collapse of the Soviet Union in 1991 led to the emergence of 15 independent States with many millions of people sharing a common history and language but divided by new political borders. Although dramatic political, economic and social disintegration has since occurred, the Russian language still plays an important role in the post-Soviet space. It is spoken not only in the Russian Federation but also in other post-Soviet States that are home to large populations of ethnic Russians and where many people speak Russian as a first language or have learned it at school (Cheskin and Kachuyevski 2019; Mustajoki, Protassova and Yelenevskaya 2019). There are apparent labour market returns to Russian language skills in this context, especially in jobs where communication is important and tasks are complex (Mavisakalyan 2017). Russian is the second official language in Belarus, Kazakhstan and Kyrgyzstan. During the Soviet and post-Soviet periods, several waves of immigration created a wide Russophone diaspora. These factors have played an important role in the development of "Runet", which is the name given to the Russophone segment of the internet. It has a total audience of approximately 110 million people and is ranked ninth in the world in terms of number of users.[2] Although it is already the largest internet market in Europe, Runet still has some potential for further growth: the internet penetration rate in the Russian Federation is around 76 per cent, approximately half of the Russian workforce uses the internet for work (either in the workplace or at home),[3] and

[1] See https://ilostat.ilo.org.

[2] See https://www.internetworldstats.com/stats7.htm.

[3] Authors' calculations using "The Russia Longitudinal Monitoring Survey – Higher School of Economics (RLMS-HSE)". See https://www.hse.ru/en/rlms/.

only 8 per cent of users search and apply for jobs online (Abdrakhmanova et al. 2020). We can conclude that a shared history and common language have contributed to the emergence of a Russian-language online labour market that integrates participants not only from the Russian Federation but also from other post-Soviet States and from the Russophone diaspora worldwide.

2.2. Russian-language freelance platforms: An overview

There has been some delay in the development of the online labour market in the post-Soviet space. At the turn of the millennium, when global freelance platforms already existed, only around 2 per cent of the population in the Russian Federation had access to the internet. The first Russian-language freelance platforms were established in the early to mid-2000s. FL.ru was founded in 2005 and has, for many years, been the leading freelance platform in the region, contributing not only to the creation of an online infrastructure for freelancing but also to the promotion of the freelance culture and lifestyle. The global economic recession of 2008–09 fostered the development of the online labour market in the Russian Federation. New business models increasingly relied on outsourcing and more workers started to consider new employment opportunities. There was a rise in the number of online labour platforms, including those with a narrow focus on specific sectors and activities. Furthermore, another economic recession in the Russian Federation in 2014 manifested itself in a dramatic currency depreciation, which meant that work for clients from the United States and Europe became particularly attractive to Russians. Various estimates suggest that the Russian Federation and Ukraine are among the global leaders in online platform work (Kässi and Lehdonvirta 2018; Graham, Hjorth and Lehdonvirta 2017).

It is very difficult to provide a realistic estimate of the number of workers engaged in online work in the Russian Federation and elsewhere. Several dozen online labour platforms currently operate on Runet and new platforms are constantly emerging as others lose prominence or cease to exist. Online labour platforms differ considerably in terms of the number of registered users, the business models used and the scope of occupations and skills covered. Table 1 provides an overview of the five largest general-purpose Russian-language platforms; two are based in Ukraine (freelancehunt.com also operating in Ukrainian). These general-purpose platforms cater to mostly high- and medium-skilled workers across a variety of job categories (such as programming, website development, graphic design, text-related services, audio, photography, video and multimedia production, engineering, marketing and consulting). Each of the platforms (except for freelancehunt.com) reports at least 1 million users. In addition, there are two large, specialized platforms for writers, namely advego.com, which reports about 3 million users, and etxt.ru, which has around 1 million users. These niche platforms, which are mainly focused on website content creation, offer small tasks such as writing short texts for prices starting as low as US$0.25 per 1,000 characters. Given that the average project price stands at around US$1–2, these platforms are not among the leaders in terms of the total value of projects.

Table 1. The largest Russian-language freelance platforms, 2019

Platform	Country of origin	Year created	Users (thousands)*	Freelancers (thousands) *	Projects per month (thousands)	Total monthly value of projects (US$ thousands)
FL.ru	Russian Federation	2005	1 500	1 000	25.0**	4 500**
kwork.ru	Russian Federation	2015	1 500	1 000	13.5*	1 400*
freelancehunt.com	Ukraine	2005	700	510	12.0**	850**
freelance.ru	Russian Federation	2010	1 000	850	7.5**	520**
weblancer.net	Ukraine	2003	1 000	ND	4.5**	450**

* Data reported by the website itself. ** Data reported by https://primelance.com/rus/analytics/.
Source: Authors' estimations and calculations based on data from open sources.

Five platforms based in the Russian Federation (FL.ru, kwork.ru, freelance.ru, advego.com and etxt.ru) have more than 1 million users each, accounting for around 8 million users in total. The two Russian-language platforms based in Ukraine (freelancehunt.com and weblancer.net) add another 1.7 million users. It should be noted that calculating the total number of registered users does not provide accurate information about the actual population of platform users because individuals usually have profiles on several websites and may become inactive over time. However, even though such figures should be treated with caution, they do indicate an increasing interest in online platform work in the Russian Federation.

In 2019, around 62,500 projects totalling US$7.7 million in value were published on the five largest general-purpose Russian-language freelance platforms (FL.ru, kwork.ru, freelancehunt.com, freelance.ru and weblancer.net). Thus, the average project price was about US$125. The platform FL.ru accounted for around 40 per cent of all projects, and approximately 58 per cent of their total value. The average price of a project on the platform was US$180. For comparison, in 2019, the two largest global freelance platforms, freelancer.com and upwork.com, each posted (on a daily or monthly basis) five to six times more projects than FL.ru. The difference in the average project price further widens the gap between such global platforms and their Russian-language counterparts. The total value of all projects posted daily on freelancer.com and upwork.com was roughly double the monthly value of all projects over this period on the five leading Russian-language platforms. Furthermore, Russian-language platforms offer less sophisticated technical and institutional infrastructure for freelance contracting compared with global English-language platforms.

3. Methodology and data

3.1. Methodological challenges

Compared with research on regular employees, freelancer and platform workers pose serious quantitative methodological challenges, since they belong to hard-to-survey populations (Tourangeau 2014). One reason for this is that national statistical offices, as well as established nationwide surveys using random probability sampling, do not typically provide detailed information about these non-standard employment arrangements. The share of platform workers is generally only around 0.5–5.0 per cent of the adult population (Piasna 2020, 15). The number of respondents in the group of platform workers in the dedicated representative surveys is thus too small for a detailed study of their internal structure and behaviour (Piasna and Drahokoupil 2019). Instead, river samples are now widely used to shed light on the characteristics of small non-demographic subpopulations, as they provide sizable samples and decrease survey costs (Lehdonvirta et al. 2021).

Second, non-standard workers have always been less accessible to researchers, owing to their weak attachment to firms and intermittent physical presence in a given location (Ashford, George and Blatt 2007; Theodore, Valenzuela and Meléndez 2006). To study populations that are geographically scattered but use certain spaces for regular meetings and congregations, researchers apply venue-based sampling methods (Lee et al. 2014). The emergence of online platforms as a new distinctive, digital-based "point of production" (Gandini 2019), akin to a factory or an office, has provided easier access to freelancers. Similarly, particular websites can be used as target group venues for certain internet-related subpopulations.

Third, although using website data (or "digital traces") to study online work is an attractive option, platforms are extremely reluctant to share such proprietary information (Horton and Tambe 2015). The full lists of target group members (platform users) are usually not made available to researchers and publicly available information is of dubious quality and incomplete. As website data are not originally produced for research purposes, they contain a very limited range of personal and demographic characteristics, which do not allow for a comprehensive description of platform workers. Besides, data contain many missing values (since freelancers are not required to fill them in) and do not provide contact information.

Fourth, researchers are dealing with an undefined population – a rather heterogeneous group with blurred boundaries. Individuals can engage in freelancing and platform work in a myriad of ways. Some may rely on freelancing as their main source of income but show up on labour platforms quite rarely; others may use platforms regularly but only to earn an additional income or pursue a hobby. Some freelancers may stick to a particular platform, while others may be active on multiple platforms.

Few dedicated academic studies contain quantitative data on the demographic and occupational composition of online freelancers (Aleksynska, Bastrakova and Kharchenko 2018; Kuek et al. 2015; ILO 2021) and microworkers (Berg et al. 2018).[4] Some studies report partial results by category of platform worker, such as online freelancers (Piasna and Drahokoupil 2019). Most studies

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[4] Freelance platforms (such as upwork.com) also conduct and commission surveys. However, these tend to use opaque methodology and produce incomplete results. See https://www.upwork.com/press/research.

report only aggregate results for the whole gig economy, including both online and localized work (Huws et al. 2019; Pesole et al. 2018).

3.2. The Russian Freelance Survey: Ten years of research

To address these methodological challenges, our research strategy relies on four waves of a dedicated online survey, which we conducted using a non-probability venue-based sampling method. The survey was hosted by the leading Russian-language platform based in the Russian Federation, FL.ru. This is a typical general-purpose platform, mainly posting high- and medium-skilled projects in categories such as programming, web development, text-related services, translation, multimedia production, engineering, marketing, legal services and consulting. Since its foundation in 2005, FL.ru has dominated the Russian-language online labour market, reporting around 1 million registered freelancers in 2019 (see table 1). This long and successful history made FL.ru a good venue for researching online labour market trends. The sampling assumed that, regardless of whether freelancers were registered on other similar websites, they tended to rely on FL.ru as the largest and the most developed infrastructure for freelancers on Runet. Although the demographic and occupational composition on other Russian-language platforms (especially niche platforms) may be different, we believe that trends on this leading general-purpose platform are representative of the key developments in the market and that our results may therefore be generalized to a wider population of Russian-speaking freelancers.[5]

To date, four waves of data collection have been conducted (in 2009, 2011, 2014 and 2019) as part of the monitoring research project entitled "Russian Freelance Survey". All waves followed a common methodology for collecting and analysing data, many questions remaining unchanged between waves. This provides an opportunity to analyse the dynamics of key indicators across a ten-year period. To recruit participants, FL.ru administrators sent subscribers emails with invitations to answer the questionnaires and advertised the surveys on social media, neither suggesting nor offering any incentives for participation. Some 90–95 per cent of respondents were registered users of FL.ru and around two thirds of respondents had profiles on more than one freelance platform. The surveys were not restricted to workers living in the Russian Federation but were also open to Russian speakers from other countries, mainly in the post-Soviet space. The questionnaires, which took about 12–14 minutes to complete (median time), included 40–54 items.

In the surveys, we used two filter questions to distinguish active freelancers from other peripheral categories such as former freelancers, occasional freelancers and individuals who had not yet had any contracts. These inclusionary criteria required respondents to be freelancers at the time of the survey and to have done more than one paid freelance project over the previous year. The number of active freelancers varied from 10,574 in 2014 to 2,055 in 2019 (see

[5] In this respect, our approach is similar to the studies of the key global freelance platforms, such as Upwork and Freelancer (Agrawal et al. 2015; Graham, Hjorth and Lehdonvirta 2017; Leung 2014).

table 2).[6] The limitations of our approach and possible systematic biases are common to online surveys, venue-based sampling and other studies that imply the self-selection of respondents (Lehdonvirta et al. 2021).[7] However, the approach helps to shed light on emerging subpopulations, such as online freelancers.

4. Tracking trends in the online freelance workforce, 2009–19

In this section, we trace the main trends in the Russian-language online labour market over the ten years covered by the Russian Freelance Survey (see table 2).[8] We also roughly compare our results with those from other studies, although differences in concepts and sampling techniques prevent us from reaching strong conclusions.

4.1. Spatial decentralization

Cumulatively, freelancers from 58 countries took part in the four waves of the survey (more than 30 countries were represented in each wave). Thirty-seven countries were represented in the last wave in 2019, including 14 out of 15 former republics of the Soviet Union (all except Lithuania), 13 European countries (Austria, Bulgaria, Czechia, Germany, Greece, Israel, Montenegro, Poland, Portugal, Romania, Serbia, Spain, United Kingdom), 8 Asian countries (China, India, Mongolia, Nepal, Philippines, Republic of Korea, Thailand, Türkiye) and Tunisia and the United States.[9] The majority of freelancers in the Russian-language online labour market live in the Russian Federation (71.4 per cent), followed by Ukraine (17.0 per cent), Belarus (3.4 per cent), Kazakhstan (2.1 per cent) and Moldova (1.1 per cent). Freelancers from the other republics of the former Soviet Union together account for 2.4 per cent of the total, and another 2.1 per cent of freelancers live outside the post-Soviet space.

The main trend in the geography of freelance and platform work is that of gradual decentralization, reflecting the spatial diffusion of this novel work model. The proportion of freelancers living outside the Russian Federation increased slightly over the period, from 24.4 per cent in 2009 to 28.6 per cent in 2019. However, owing to political circumstances, this trend was uneven. During the first five-year period, the share of Russian Federation residents in the total sample decreased from 75.6 per cent in 2009 to 61.9 per cent in 2014, whereas the share of freelancers from Ukraine increased from 15.0 to 26.5 per cent over

[6] In 2019, there was a considerable drop in the number of respondents for various reasons, including user fatigue from many other polls on the site, customization of alerts and the use of information filtering tools to prevent unwanted emails (including survey invitations) and platform access through a mobile application interface (bypassing survey promotion banners).

[7] As our study targeted active online freelancers, freelancers who use digital platforms irregularly and other peripheral categories are likely to be under-represented.

[8] More detailed data are available from the authors upon request.

[9] In fact, the geography of the Russian-language online labour market is much wider, and the best way to study it is by using “big data” collected directly from the platforms.

Table 2. Main characteristics of Russian-speaking freelancers (percentages)

		2009	2011	2014	2019
Number of active platform freelancers		8 613	7 179	10 574	2 055
Geography	Russian Federation	75.6	69.5	61.9	71.4
	Moscow*	30.6	25.1	22.1	18.9
	St Petersburg*	10.5	10.4	11.0	11.4
	Other Russian regions*	58.9	64.5	67.0	69.7
	Ukraine	15.0	21.3	26.5	17.0
	Other post-Soviet countries	8.8	8.2	10.6	9.0
	Non-post-Soviet countries	0.3	0.6	0.8	2.1
Professional skills	Programming and website development (ICT)	41.8	36.3	31.6	28.5
	Graphic design and creative arts	43.6	38.4	36.1	36.7
	Engineering	2.3	5.2	7.4	8.1
	Photography/audio/video	12.3	12.3	13.4	13.7
	Writing/editing/translation	21.3	33.5	33.4	27.9
	Business services	11.0	12.3	13.6	20.3
Gender	Male	66.5	61.3	57.8	57.5
	Female	33.5	38.7	42.2	42.5
Age	≤ 22	31.6	21.9	12.6	10.9
	23–26	28.9	27.7	24.1	15.6
	27–30	18.3	21.4	21.3	19.3
	31–40	15.6	19.3	26.2	33.4
	≥ 41	5.6	9.8	15.8	20.8
	Mean (years)	26.6	28.5	31.5	33.5
Family	Married	32.1	37.8	44.2	45.8
	Have children under the age of 16	31.6	35.9	38.4	39.8
Education	Secondary education, no degree	19.7	17.5	15.2	20.4
	Unfinished higher education	26.3	21.0	14.4	12.5
	Higher education	54.0	61.5	70.5	67.1
Employment	Genuine freelancers	44.9	49.5	49.7	66.2
	Moonlighters	45.3	41.5	40.0	26.9
	Entrepreneurs	8.9	8.2	9.6	6.9
Freelance tenure	≤ 1 year	22.8	25.8	16.1	17.9
	1–3 years	54.1	49.3	45.7	32.7
	4–9 years	19.4	20.3	31.1	34.6
	≥ 10 years	3.7	4.6	7.2	14.8
	Mean (years)	2.5	2.6	3.7	4.8
Job-search channels	Via online freelance platforms	42.3	49.6	53.1	67.3
	Only via online freelance platforms	8.4	8.8	11.2	14.5
Agreements	A legal written contract	11.6	11.7	12.4	15.3
	Online platform procedures	–	–	14.8	18.2

* Percentage of the number of Russian freelancers.

Notes: For samples of 2,055 and more respondents, the random measurement error does not exceed 2.2 per cent for a 95 per cent confidence level. To compare results in 2009 and 2019, we ran non-parametric Mann–Whitney U tests for all nominal and ordinal variables in table 2 and ANOVA tests for interval variables. All the differences were statistically significant at the 0.1 per cent level, with the exception of one variable – the proportion of freelancers with professional skills in photography, audio and video production.

Source: Authors' calculations based on Russian Freelance Survey data.

the same period. The conflict between the Russian Federation and Ukraine in 2014 (immediately after the third wave of the survey) reversed this trend and the share of Ukrainian freelancers fell to 17.0 per cent in 2019. Some freelancers from Ukraine stopped working with Russian clients and left platforms based in the Russian Federation. Over the same period, several online platforms based in Ukraine began to flourish (Aleksynska, Bastrakova and Kharchenko 2018). However, the data suggest that the decrease in the share of freelancers from Ukraine in the Russian-language market was primarily the result of a lower inflow of newcomers, rather than the outflow of more experienced freelancers. According to the 2019 survey, Ukrainians accounted for 22.8 per cent of respondents who became freelancers in 2013 or earlier, which is quite close to the result obtained in 2014 (26.5 per cent) and reveals only a small outflow among this group. However, residents of Ukraine make up only 12.9 per cent of new freelancers over the past five years, halving the inflow of new users, compared with the situation before the 2014 conflict.

The process of decentralization is more pronounced in the Russian Federation, gradually levelling out what used to be a largely Moscow-centric online labour market. The share of Moscow residents fell dramatically from 30.6 per cent in 2009 to 18.9 per cent in 2019. The share of freelancers from the second major city, St Petersburg, remained almost unchanged (10.5 per cent in 2009 and 11.4 per cent in 2019), whereas the share from the other Russian regions increased from 58.9 per cent in 2009 to 69.7 per cent in 2019. This suggests that the online labour market has helped freelancers from other Russian regions and outside the Russian Federation to overcome the constraints of local demand and participate in the emerging digital economy. In the future, this process of "virtual migration" is likely to continue.

Some studies also reveal an uneven geography of platform work. In Ukraine, just over half (52 per cent) of online freelancers were distributed across four major cities (Aleksynska, Bastrakova and Kharchenko 2018). The concentration of platform work around capital cities or other large conurbations has also been observed in Austria, Italy, the Netherlands, Switzerland and the United Kingdom (Huws et al. 2017). It would be interesting to investigate whether a trend towards the decentralization of platform work can also be observed in these and other countries.

4.2. Occupational diversification

Online labour platforms arrange freelancers' skills and job projects into categories that represent conventionally recognized divisions of tasks (Leung 2014). These categories are very similar around the world, although the particular occupational composition may differ across platforms. The range of skills that freelancers can offer online is largely limited by the feasibility of digitizing the deliverables and of their subsequent delivery online. Unsurprisingly, the pioneers of online labour markets were programmers, website developers and other ICT professionals. However, occupational diversification – that is, changes in the general occupational structure of the online labour market – has led to a rising supply of skills that were previously under-represented.

Over the ten-year period of our study, we observe a marked decline in the presence of the broad ICT category, including programming and website development, from 41.8 per cent in 2009 to 28.5 per cent in 2019. The share of graphic design and creative arts occupations also decreased considerably, from 43.6 per cent in 2009 to only 36.7 per cent in 2019. Conversely, the shares of two particular occupational categories have grown steadily: engineering (from 2.3 to 8.1 per cent) and business services (such as advertising, marketing and consulting) (from 11.0 to 20.3 per cent). The proportion of freelancers with writing, copywriting, editing and translation skills increased sharply, from 21.3 per cent in 2009 to 33.5 per cent in 2011, before falling to 27.9 per cent in 2019. The proportion of occupations requiring audio, video and photography skills grew only slightly (from 12.3 to 13.7 per cent).[10] From this, we conclude that not only ICT workers but also freelancers from other occupational groups have increasingly joined the online labour market and have become familiar with freelance platform work.

4.3. Feminization

In general, online freelancers and platform workers are somewhat more likely to be male than female, although the gender profile varies by country and platform (Aleksynska 2021; Huws et al. 2019; Kuek et al. 2015; Pesole et al. 2018; Berg et al. 2018; ILO 2021). Our study sheds light on the evolution in the gender composition of online freelancers over time. In the early period, the gender disparity was particularly evident in the Russian-language online labour market, where many more men than women did platform work. We use the term “feminization” to refer to a process through which increasing numbers of women become involved in an activity that was once dominated by men. In 2009, around 66.5 per cent of active freelancers were male and 33.5 per cent were female; however, by 2014 the gap had narrowed to 57.8 and 42.2 per cent, respectively. In 2019, the share of women remained at a similar level (42.5 per cent). In occupational terms, we observe a remarkable growth in the number of female workers in ICT (from 13.2 per cent in 2009 to 20.8 per cent in 2019), in business services (from 36.7 to 51.4 per cent) and in copywriting, editing and translation (from 59.3 to 66.8 per cent). This last category is the only one that was already feminized. Other occupations showed little change.

Overall, it seems that men pioneered the development of online labour markets but, as this model of work became generalized, women also started taking up online jobs more actively and the online labour market progressively started to resemble the general labour market. According to the Russian Federal State Statistics Service (Rosstat), the share of women in the Russian labour force stood at about 49 per cent in both 2009 and 2019, such that participation growth in the online labour market is not a reflection of growth in the female labour force.[11] There are also good reasons to believe that the share of women in the online freelance market will continue to grow in the future.[12] These dynamics

[10] As multiple answers were possible, the sum of answers in any survey wave exceeds 100 per cent.

[11] See https://rosstat.gov.ru/folder/210/document/13210.

[12] A similar process was observed in the development of the gender composition of internet users in the Russian Federation.

can be partially traced by looking at the share of men and women by their experience, or “tenure”, of freelance work. In contrast to the proportions among more experienced workers, there is a higher share of women (55.7 per cent) than men among newcomers (those who had been freelancing for less than a year). Moreover, comparisons with earlier waves indicate that there has been no significant outflow of women over time: among workers with over five years of online tenure, the share of women in 2019 remains almost the same as in the 2014 wave (37.0 and 42.2 per cent, respectively).

4.4. Maturing

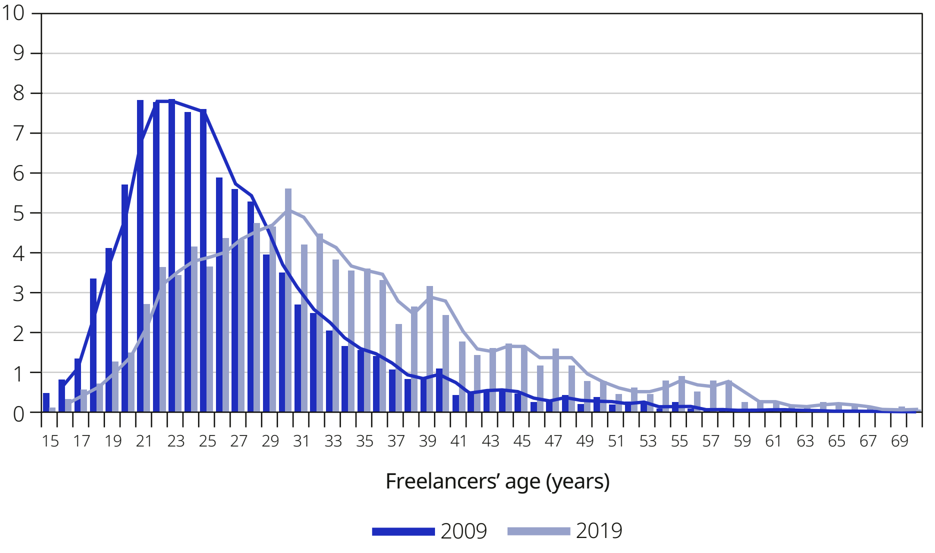
Online freelancers in the Russian Federation tend to be quite young. In 2019, around half of the respondents were under the age of 32 and only a fifth of them were over 40. Studies conducted in advanced market economies with long-standing freelance traditions indicate very different age patterns for their freelance populations, where the average age is 45 (Rodgers, Horowitz and Wuolo 2014), although online freelancers may be somewhat younger (Huws et al. 2019; Pesole et al. 2018; Piasna and Drahokoupil 2019). In this context, freelancing is “not a young person’s game” (Barley and Kunda 2004, 53) but rather the “free agent” preference of an experienced worker. We propose that, in the Russian Federation, younger generations are not only more advanced in terms of ICT compared with earlier generations but they also grew up during the post-Soviet period and are more open to independent and entrepreneurial work.[13] Studying online freelancers in Ukraine – another post-Soviet country – revealed an almost identical age distribution, the average age being 33, and only 21 per cent of workers being over the age of 40 (Aleksynska, Bastrakova and Kharchenko 2018).

Our data suggest that the Russian-language online labour market was pioneered by young people: in 2009, 31.6 per cent of freelancers were under the age of 22 and about 60 per cent were under the age of 26 (see figure 1). However, the average age of online freelancers then started to rise, from 26.6 in 2009 to 33.5 in 2019. In particular, the percentage of freelancers over the age of 30 more than doubled over that period, from 21.2 per cent in 2009 to 54.2 per cent in 2019. Compared with the general working population in the Russian Federation, online freelancers were 13 years younger in 2009 and 7 years younger in 2019 – a trend that we anticipate continuing in the future. This can be explained by both the natural “ageing” of the FL.ru audience over time and a growing proportion of older people among newcomers. Among workers with less than a year’s experience of freelancing, the share of people aged 31–40 increased from 12.6 per cent in 2009 to 21.9 per cent in 2019, and the share of those over 40 increased from 4.3 to 18.7 per cent.

Despite conventional wisdom, studies suggest that, in general, online freelancers and platform workers are likely to be married and have children

[13] There is evidence that in transition economies, the older generation is far less entrepreneurial, suggesting a legacy of values and norms that are not conducive to entrepreneurship (Estrin and Mickiewicz 2011).

Figure 1. Age distribution of freelancers in 2009 and 2019



Source: Authors' calculations based on Russian Freelance Survey data.

(Aleksynska, Bastrakova and Kharchenko 2018; Pesole et al. 2018). Our surveys revealed a large increase in the proportion of freelancers who were officially married (from 32.1 per cent in 2009 to 45.8 per cent in 2019), had children under the age of 16 in their households (from 31.6 to 39.8 per cent) and had two or more children (from 7.0 to 14.2 per cent). This may suggest that, despite general insecurity, freelancing may be an attractive option for those who need more flexibility to balance work and family life. We conclude that while young people initially pioneered the Russian-language online labour market, more mature individuals with greater family obligations have increasingly turned to freelance and platform work.

4.5. Rising educational attainment and educational mismatch

Our surveys indicated that workers with higher levels of education are progressively entering the Russian-language online labour market. The share of freelancers with a university degree increased from 54.0 per cent in 2009 to 67.1 per cent in 2019. For comparison, only about 30 per cent of the general working population in the Russian Federation has this level of educational attainment.[14] This trend may be due to the changing age composition of the freelance workforce. The share of freelancers with unfinished higher education (mainly students) fell sharply from 26.3 per cent in 2009 to 12.5 per cent in 2019. This is also in line with the above-mentioned shift in the age composition in the Russian-language online labour market.

[14] Authors' calculations using RLMS-HSE data. See https://www.hse.ru/en/rlms/.

However, the rising level of educational attainment of platform workers may mask another process. In developed economies, there is great concern over vertical skill mismatch and deskilling when highly educated people have to turn to performing simple tasks in the gig economy in the absence of decent work opportunities in the traditional labour market (Pesole et al. 2018). Our survey provides measures of education–occupation mismatch. In 2011, 23.5 per cent of respondents with a university degree reported that their current occupation as a freelancer completely mismatched their field of study – a proportion that had risen to 35.7 per cent in 2019. According to the 2019 survey data, severe educational mismatch is more widespread among creative occupations, such as audio, video and photography production (50.9 per cent), and graphic design and creative arts (42.5 per cent). The mismatch is not correlated with age but, in terms of gender, male freelancers are more mismatched than their female counterparts (38.0 per cent compared with 32.9 per cent). Interestingly, educational mismatch among freelancers does not diverge greatly from the mismatch found in the general labour market in the Russian Federation, where the share of severely mismatched workers rose over a similar period (from 33.4 per cent in 2009 to 37.5 per cent in 2018) and men are more mismatched than women.[15] The trends in educational attainment and educational mismatch deserve more detailed analysis and may be rooted in wider structural problems in the economy.

4.6. The consolidation of freelance careers

Freelancing may be the main career choice or part of wider job portfolios and hybrid careers (Bögenhold and Klinglmair 2016). There is evidence from various countries that many freelancers are involved in the gig economy on a part-time basis to supplement their incomes or try out new work patterns (Berg et al. 2018; Huws et al. 2017; Piasna and Drahokoupil 2019; ILO 2021). Our ten-year perspective of the Russian-language online labour market reveals a considerable decrease in the number of “moonlighters”, that is, people for whom freelancing is a secondary job to supplement other employment (from 45.3 in 2009 to 26.9 per cent in 2019). Conversely, the proportion of genuine freelancers increases markedly, from 44.9 per cent in 2009 to 66.2 per cent in 2019. Additionally, we distinguish a fairly constant share of entrepreneurs who started up their businesses with hired employees while they continued actively freelancing (8.9 per cent in 2009 and 6.9 per cent in 2019). When asked about income, the share of those earning three quarters or more of their income from freelancing increased from 40.0 to 59.7 per cent over the ten-year period. We conclude that an increasing number of people in the Russian Federation approach freelancing as a viable labour market option.[16]

As Russian-speaking online freelancers tend to be recruited from younger cohorts, they typically have limited freelance experience or tenure. However, the average freelance tenure almost doubled over this period, from 2.5 years

[15] See footnote 14.

[16] The study of US freelancers commissioned by Upwork and the Freelancers Union also spotted an upward trend in the share of full-time freelancers. See https://www.upwork.com/press/releases/freelancing-and-the-economy-in-2019.

in 2009 to 4.8 years in 2019. Most respondents worked as freelancers for three years or less, although the share of this group declined from 76.9 per cent in 2009 to 50.6 per cent in 2019. The proportion of workers with four to nine years' freelance tenure increased from 19.4 to 34.6 per cent and the share of highly experienced workers (ten years or more) increased from 3.7 to 14.8 per cent over the period. In advanced market economies, individuals tend to have much higher levels of freelance experience. For instance, Rodgers, Horowitz and Wuolo (2014, 715) reported that independent workers in the United States on average have around ten years of "free agent" tenure. We nevertheless conclude that online freelancing in the Russian Federation is becoming a longer-term career choice.

4.7. Platformization

The literature about the transformative role of labour platforms tends to ignore the working lives of freelancers beyond those platforms. This may be misleading and may oversimplify the reality of freelance and platform work. Our survey helps shed light on "platformization" as a gradual process that reflects the increasing influence and importance of online labour platforms in the Russian Federation. Our respondents tend to use multiple online platforms, including English-speaking ones. The share of freelancers who were registered on two or more platforms grew from 50.6 per cent in 2009 to 66.4 per cent in 2019,[17] while the share of those who were registered on English-speaking platforms grew from 9.6 to 30.5 per cent over the same period.

One of the main functions of online labour platforms is matching freelancers to clients. However, freelancers may find projects through social ties (regular clients and referrals) and other digital tools (such as personal websites and social media). Although almost all of our respondents were registered users of online labour platforms, far from everyone mentioned those platforms as their main job-search channel. In 2009, only about 42.3 per cent of freelancers reported that they regularly found projects through those platforms and a very small share (8.4 per cent) relied on platforms entirely, using them as their single source of new projects. Over the study period, the importance of platforms as a means of finding jobs increased gradually. In 2019, 67.3 per cent of freelancers found projects through online platforms, including 14.5 per cent of freelancers who relied on platforms entirely for their work. For comparison, 79.9 per cent of freelancers received projects from regular clients and referrals, including 20.3 per cent of respondents who only used established social ties (not platforms). This provides a more nuanced image of a socially embedded freelancer rather than that of an atomized platform worker. More research is needed on this in other contexts (Wood et al. 2019; Shevchuk and Strebkov 2018).

Other indicators may also point to the increasing role of platforms. As is also shown below, a growing number of freelancers make use of platform arrangements, such as arbitration. In 2009, only 2.1 per cent of the freelancers who had disputes with their clients reported that the platform helped them reach a

[17] Although some commentators point to the possible "stickiness" of freelancers to a single platform (De Stefano 2015), our data do not provide evidence for this.

resolution. In 2019, this share increased to 10.6 per cent. Overall, our data suggest that, although the role of platforms in freelance employment may be somewhat overstated in the literature, their importance has increased over time.

4.8. Legalization

In the Russian Federation, as in many other countries, freelance and platform work falls outside the scope of labour law, such that the parties have no other option than to conclude a contract for services under the provisions of the Civil Code. Online platforms seek to provide dedicated contracting arrangements such as "save pay" (or escrow options).[18] Russian-language platforms typically offer these arrangements as an option rather than an obligation for their users. However, in practice, freelancers and their clients tend to avoid formal agreements and, consequently, paying taxes. Small-scale operations, a need for agility and flexibility, virtual transactions crossing geographical and political borders, regulatory deficiency and costly litigation may contribute to informal agreements between freelancers and their clients. Some studies of other countries report a high level of informality in freelance contracting (Rodgers, Horowitz and Wuolo 2014). Our data indicate that formal contract arrangements are in the minority in the Russian Federation, but that there is a subtle and gradual trend towards legalization. Only a small proportion of freelancers routinely rely on formal arrangements through legal written contracts and platform procedures that, among other things, may have tax implications. The share of freelancers using written legal contracts slightly increased from 11.6 per cent in 2009 to 15.3 per cent in 2019. The share of freelancers using platform contracting arrangements ("save pay" or escrow options) rose from 14.8 per cent in 2014 to 18.2 per cent in 2019.[19] Nevertheless, about two in three freelancers mainly use informal agreements with their clients.

Further analysis points to divergent paths in the formalization and legalization of freelance contracting in the Russian-language freelance market. More experienced and successful freelancers are more likely to operate under legal contracts, whereas platform contracting procedures are particularly important for newcomers and when dealing with smaller tasks and transnational transactions. According to the last wave of the survey (2019), legal written contracts are more common among freelancers (entrepreneurs) starting their own business (42.1 per cent); experienced workers with freelance tenure of more than ten years (23.6 per cent); and freelancers in business services, including advertising, marketing and consulting (23.3 per cent). Conversely, recourse to online platform procedures is more typical among workers with less than a year's freelance experience (27.9 per cent); freelancers from countries of the former Soviet Union (23.5 per cent); freelancers working for clients from these countries (22.1 per cent); freelancers offering writing, editing and translation services (22.8 per cent); and those offering photo, audio and video services (21.2 per cent).

[18] Escrow is a contractual arrangement common in freelance platforms wherein a third party holds money in a dedicated account until both parties verify the transaction has been completed as per the terms set.

[19] This question was not included in the 2009 and 2011 waves.

5. At the crossroads: The future of freelance and platform work in Russia

Freelance platform work constitutes an emerging model of work with a relatively short history, highlighting the importance of tracing demographic and compositional changes in the freelance workforce in online labour markets across the world. Such an approach helps shed light on the evolving structure and the future of online platform work worldwide, identifying both the common and unique features of these markets.

The Russian Federation has become the centre of a distinct online market for freelance work, based on a common past and a common language. In the post-Soviet context, freelance and platform work is an innovative social practice. The short history of self-employment and independent work should therefore be considered when comparing and contrasting the Russian Federation online labour market with that of other countries. A new generation of highly educated and entrepreneurial workers engaged in ICT and creative industries may be crucial for the modernization of transition economies. Given the number of registered users on the largest Russian-language freelance platforms, we estimate that several million people have gained experience of self-employment in the online labour market. Although not all succeed and many finally leave online freelancing, this experience is very important for their careers and the economy as a whole.

In this article we have traced major changes in the Russian-language freelance market from 2009 to 2019. Overall, we have observed how online freelancing as an innovative work practice has spread to the wider population. Online freelancers have become older, more experienced, have higher levels of educational attainment and are more likely to identify freelancing as their primary activity. Furthermore, the freelancer profile has become more diversified and represents an increasing number of women. Decentralization has witnessed the spread of freelancers from the metropoles of Moscow and St Petersburg to other regions. Lastly, skills other than ICT and design (such as writing, editing, translation, engineering, audio and video production, advertising, marketing and consulting) have gained prominence. All these elements suggest that online freelance work has established itself as a distinct employment option in the Russian Federation and other post-Soviet States. Digital labour platforms play an increasingly important role in this process, gaining more prominence as a regular source of jobs and in providing dedicated infrastructure (such as "safe pay" and arbitration). However, our study also suggests that the image of atomized platform workers may be illusive, given that freelancers are socially embedded in wider contexts beyond digital labour platforms.

Since the very beginning, the Russian-language online labour market has largely been a part of the "shadow economy", based on informal agreements and tax avoidance. For many years, the new phenomenon of freelance platform work has been virtually ignored by the State, generating a regulative void, offering neither legislative guidelines nor pragmatic administrative solutions. Only in 2013 was an amendment made to the Russian Labour Code, introducing the concept of "remote work" (Gerasimova, Korshunova and Chernyaeva 2017).

However, its rigid and narrow approach addressed only "remote employees" and failed to meet the realities of separate, short-term and, often, transnational transactions carried out via online labour markets. Our survey revealed the prevalence of informal contracting and only a subtle trend towards legalization among online freelancers. Recently, the Russian Government has been paying increasing attention to the legalization of self-employment, seeking to simplify and decrease taxation (by introducing a dedicated mobile app for the self-employed). In 2019 (after the last wave of our survey), a new tax regime for the self-employed was piloted in several of the Russian Federation regions and it was extended to the rest of the country in late 2020.

In contrast to many other countries, in the Russian Federation, discussions about the classification, labour rights, social protection and collective representation of platform workers are only in their infancy (Chesalina 2020). There is no coordination between legislative procedures and labour, social and tax law reforms. Although self-employed workers in the Russian Federation have some formal access to pensions and health insurance, in practice online freelancers bear all the risks and remain insecure. The Russian Federation has yet to develop a more universal approach to providing decent social protection irrespective of the form of employment (Behrendt, Nguyen and Rani 2019). Whereas international and European trade unions have been paying increasing attention to platform work (Donini et al. 2017; Johnston and Land-Kazlauskas 2019; ILO 2021), Russian trade unions have engaged much less with these issues. The social heterogeneity of online freelancers, as well as their spatial (including transnational) dispersion, create serious challenges not only for state regulation but also for establishing common interests and collective agency among workers (Johnston 2020).

Summing up, the first stage in the development of the Russian online labour market is over. Dozens of freelance platforms, including several major players, have come into existence and structured the market. After an initial period of extensive growth, the online labour market has entered maturity; it now constitutes a visible phenomenon in the Russian economy and receives more attention from the State. However, the persistent informality of freelance platform work and the lack of collective representation, basic labour rights and social protection will present major challenges in the years ahead. The COVID-19 pandemic and the renewed conflict between the Russian Federation and Ukraine may also substantially affect the further development of online labour markets.

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