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NEW FORMS OF WORK AND PLATFORM WORK IN SEMED

Country profile: Israel

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Setting the scene

Main economic indicators

According to the World Bank's income level classification,[1] Israel can be regarded as a high-income country with a GDP per capita of USD 54,659. This is several times higher than all of the other countries in the SEMED region. Services dominate Israels economy, contributing a 73% share of GDP. [2]

The Israeli economy has proven resilient against the economic impact of the war in Ukraine, as well having rebounded from the COVID-19 pandemic. GDP growth is expected to be moderate but robust, reaching 2.9% in 2023 and 3.3% in 2024.[3] This is a significant drop in contrast to the strong growth of 6.3% seen in 2022. Private consumption has contracted slightly, but investment has expanded robustly and confidence in the business sector remains positive. Israel's consumer price index, at 5.1% in October 2022, was lower than in most OECD countries, but above the central bank's 1-3% target range. Furthermore, inflation has become increasingly broad-based, with around three-quarters of the components of the consumer price index rising faster than the central bank's target. Expected inflation for the year ahead stands at are around 3%. Lastly, real wages have declined somewhat over recent months, despite robust nominal wage growth.[4]

Israel's pattern of migration differs significantly from other countries in the SEMED region, due to the high influx of long-term migrants. Most migrants coming to Israel are in the process of undertaking Aliyah, which means they plan to settle in Israel for a long period of time. This is enabled by the 'Law of Return', an Israeli law that allows Jewish people to gain automatic citizenship. Some 70,000 new immigrants from 95 countries arrived in 2022, which is the largest number in recent years. Most of these immigrants came from Russia and Ukraine, while the rate of Aliyah from most countries has returned to the pre-pandemic levels[5].[6] Of concern to migration workers, at the end of 2021, there were around 123,000 foreign workers in Israel who entered with work permits, and around 24,000 foreign citizens who entered using a tourist visa and overstayed.[7]

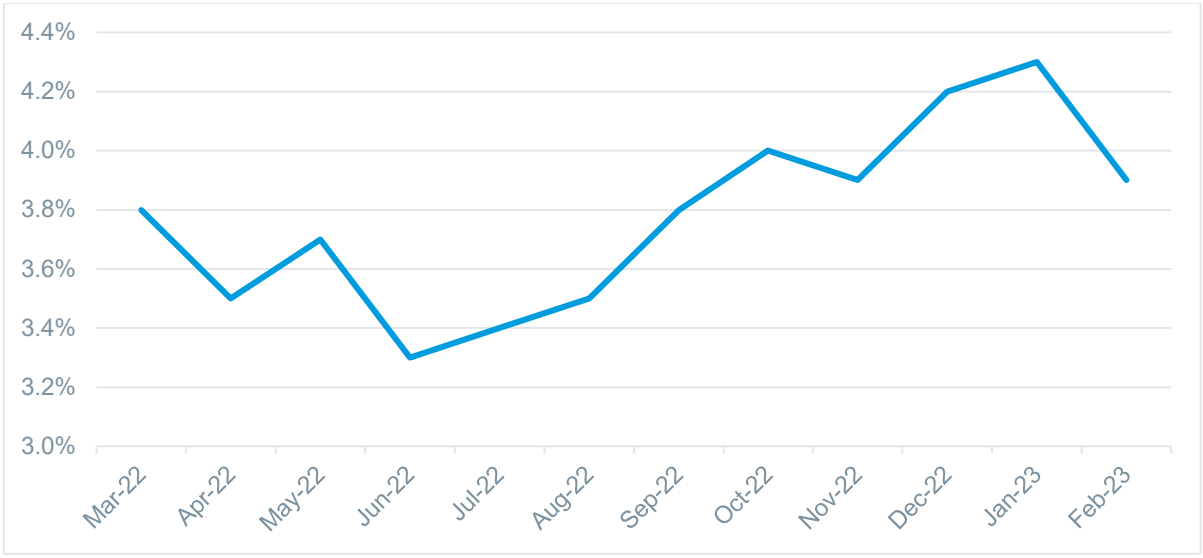
Labour market

As of January 2023, the number of persons in Israel's labour force aged 15 and over was 4.456 million. Of these, 4.263 million were employed, and around 193,000 were jobless. Among those who were employed, 2.208 million were men and 2.055 million were women.[8] The unemployment rate in Israel is relatively low in comparison to the rest of the SEMED region. According to the ETF's KIESE database, the unemployment rate for both men and women was around 5% in 2021.[9] As can be seen from the graph below, based on the CBS data,[10] Israel's unemployment rate fell dramatically in the spring of 2022, to less than 3.5%, one of the lowest in the country's history. The unemployment rate then rose to

[1] https://blogs.worldbank.org/opendata/new-world-bank-country-classifications-income-level-2022-2023
[2] https://data.worldbank.org/indicator/NV.SRV.TOTL.ZS?locations=JO-EG-IL-DZ-LB-LY-MA-TN-PS
[3] OECD, Economic Outlook for Israel, June 2023, https://issuu.com/oecd.publishing/docs/israel-oecd-economic-outlook-june-2023?fr=sZGY5MzUwNTY2MTA
[4] OECD, Economic Outlook for Israel, June 2023, https://issuu.com/oecd.publishing/docs/israel-oecd-economic-outlook-june-2023?fr=sZGY5MzUwNTY2MTA
[5] CBS Labour force survey, January 2023, https://www.cbs.gov.il/he/publications/DocLib/2023/saka0123m/e_print.pdf https://www.cbs.gov.il/he/publications/DocLib/2023/saka0123m/e_print.pdf
[6] Ruppin, OECD Expert Group in Migration 2020-2021, in.ac.il/-מכוני-מחקר/המכון-להגירה-ושילוב-חברתי/Documents/The OECD Expert Group on Migration 2020-2021.pdf
[7] CBS Foreign Workers who Entered Israel, 2021.Foreign Workers who Entered Israel, 2021 (cbs.gov.il)
[8] CBS Labour force survey, January 2023, https://www.cbs.gov.il/he/publications/DocLib/2023/saka0123m/e_print.pdf
[9] ETF KIESE Database, 2022. https://www.etf.europa.eu/sites/default/files/2022-11/KIESE%202022%20Final.pdf
[10] CBS Labour force survey, January 2023, https://www.cbs.gov.il/he/publications/DocLib/2023/saka0123m/e_print.pdf

around 4.3% at the beginning of 2023. However, it remains by far the lowest unemployment rate in the SEMED region, followed by Egypt with 7%. Unemployment in the region is highest in the West Bank and Gaza, at 25.7%.[11]

Figure 1. Unemployment rate (%) in Israel, 2022-2023



Source: CBS data.[12]

As shown above, the Israeli economy is in a state of almost full employment. Indeed, in certain sectors, especially in high-tech industry, which accounts for 16% of the total workforce,[13] there is a significant shortage of workers in the country that hinders economic growth. The rate of self-employment stood at 12.4% in 2021.[14]

The gender wage gap in Israel has declined over recent decades, but women's wages remain lower on average than men's. This gap is particularly pronounced when compared with other OECD countries. Out of these countries, Israel had the second highest median wage gap between men and women in 2021, standing at 25.4%.[15]

The labour market has rebounded well after the COVID-19 pandemic. This is shown by an increase in employment and incomes that is higher than they had been prior to the pandemic. However, this recovery has not been uniform across all parts of the economy. Most of the jobs added since 2019 have been in the health, welfare and nursing care industries (59% of all new jobs in the economy) and in high-tech industry (32%). The largest increases in jobs relative to the past were also in the high-tech (26%) and health industries (19%). Wage increases are not uniform either; average monthly wages rose by 18% in the high-tech sector from 2019 to 2022, but only by 4% in the education sector, and even dropped by 9% in the health and welfare industries.[16]

Trends in employment and wages across different industries have varied greatly during this general recovery. However, according to the predictions of the Bank of Israel and the OECD, the expansion of employment is expected to benefit various regions and sectors of the population, while the accumulation of human capital in the workforce via the acquisition of academic education is a cause for optimism.

[11] World Bank, Unemployment rate in the SEMED region, https://data.worldbank.org/indicator/SL.UEM.TOTL.ZS?locations=TN-IL-JO-EG-DZ-LB-SY-MA-PS-LY
[12] https://www.cbs.gov.il/he/publications/DocLib/2023/saka0123m/e_print.pdf
[13] CBS Labour force survey, January 2023
[14] ETF KIESE database, 2022, https://www.etf.europa.eu/sites/default/files/2022-11/KIESE%202022%20Final.pdf
[15] OECD, Gender Wage Gap, 2022.
[16] Debowy, M., Eppstein, G., & Weiss, A. (2022). The Labor Market in Israel: An Overview, Labor-Market-Overview-ENG-2022.pdf (taubcenter.org.il)

Youth statistics

As of 2021, there were approximately 1.43 million young people aged from 15 to 24 living in Israel. The share of youth in the total population currently stands at approximately 15.2%. According to data from 2021,[17] youth unemployment stood at 7.8% and was slightly higher among females than among males. Although this figure is higher than the general unemployment rate in Israel, it is still significantly lower than in the rest of the SEMED region.

Data from 2021[18] also indicate that 16.8% of Israel's youth population was considered not in education, employment or training (NEETs). This is an alarming sign, as the share of NEETs has risen by almost 3.5% since 2018. While share of NEETs among men is 16.3%, among women they represent 17.2%.[19] However, studies suggest that there is a big difference in the number of NEETs between ethnic groups. Arab youth in particular appear to be disadvantaged with regard to their education and training, as well as in their job prospects. The figures for NEETs of Arab origin are up to 10% higher.[20]

Internet and digitalisation

In 2020, around 90% of Israel's population aged 20 and above used the Internet, which is higher than in the rest of the SEMED region.[21] However, significant differences exist in Israeli society with regard to internet access. For example, ultra-Orthodox Jews, who account for 13.5% of the Israeli population, have very limited access to the Internet due to strict lifestyle rules. Over 50% of households in Israel now have access to fast fibre-optic internet infrastructure, while only around 17.9% of households were connected to such a service at the end of 2021. The number of households that have access to (and those which are actually connected to) fibre-optic internet almost doubled during the course of 2021, and increased several times compared with the end of 2018. [22]

Children from low socio-economic backgrounds tend to have their first access to the Internet at a later age than those from higher socio-economic backgrounds. This suggests that inequalities in digital skills are established even at a young age. During 2020, 47% of Israel's population aged 20 and above purchased products and services online. This share is significantly lower than the average for top-tier countries (around 77%), which can probably be ascribed to the low rates of internet use among Israel's Arab population, ultra-Orthodox Jews, and persons aged 60 and above.[23]

The ICT sector is exceptionally strong in Israel. Exports of ICT goods represented a share of around 14.3% of all goods exports in 2020, and ICT services exports as a share of all services exports stood at 35.6%. These rates are significantly higher than in other OECD countries,[24] which indicates the major impact that the high-tech sector has on the Israeli economy. Consequently, employment in the ICT sector in Israel is exceptionally high. In 2020, the proportions of persons employed in ICT industries and in ICT occupations in Israel were the highest among all OECD countries (approximately 5% and 8%, respectively).

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[17] KIESE database.
[18] Share of youth not in education, employment or training, total (% of youth population) – Israel | Data (worldbank.org)
[19] Share of youth not in education, employment or training, female (% of female youth population) – Israel | Data (worldbank.org)
[20] NEET Among Young Arabs in Israel, https://en.idi.org.il/media/9319/neet-among-young-arabs-in-israel.pdf
[21] https://data.worldbank.org/indicator/IT.NET.USER.ZS?locations=IL
[22] Israel Internet Association (2021). Data on internet users. https://en.isoc.org.il/data-and-statistics/israel-internet-use-2021
[23] Israel Internet Association (2021). Data on internet users
[24] For example, the project 'Digital Indices in Israel' (a joint project of the Central Bureau of Statistics and the Headquarters for the National Digital Israel Initiative), for the purpose of international comparison, used the following countries similar in some of their characteristics to the Israeli economy (1) Austria, Ireland, Finland, the Netherlands, and Sweden – where GDP per capita and the level of digitalisation are relatively high compared with other OECD countries; and (2) Italy, Portugal, and Poland – which in most cases are towards the bottom of OECD countries with regard to digitalisation. Source: Digital Indices in Israel (cbs.gov.il)

It is estimated that during 2021 (when restrictions on gatherings were significantly eased compared to 2020) the proportion of persons employed working remotely in Israel was 16.2%. This indicates that this mode of work was stable, and might continue even after the COVID-19 crisis.

The level of digital skills in Israel is higher than in the rest of the region. However, Israel has yet to bridge existing educational gaps. The percentage of adults in Israel aged 16 to 65 with low levels of literacy or numeracy is estimated at 37%.[25] Many of these people come from a low socio-economic background. The share of adults with low basic digital skills is particularly high among Jewish ultra-Orthodox and Arab populations, as well as other people of low socio-economic status.[26]

Further digital skill development depends on the ability of teaching staff to adapt to ongoing developments and adjust to changes in teaching and learning methods. This challenge is especially significant with regard to the use of computer and internet applications. It has been found that the level of teachers' digital skills is not optimal, and neither is their training in this area. Only 52% of teachers who participated in the TALIS 2018 survey reported that they had a sense of capability to assist students in learning to use digital technology, compared with the OECD average of 67%.[27]

[25] OECD (2018). https://www.oecd-ilibrary.org/sites/9789264302051-7-en/index.html?itemId=/content/component/9789264302051-7-en#figure-d1e5421
[26] Workforce 2030, Challenges and Opportunities, available at: https://www.mevaker.gov.il/En/publication/Documents/2021-WORKFORCE-2030.pdf?AspxAutoDetectCookieSupport=1
[27] https://www.oecd.org/education/talis/

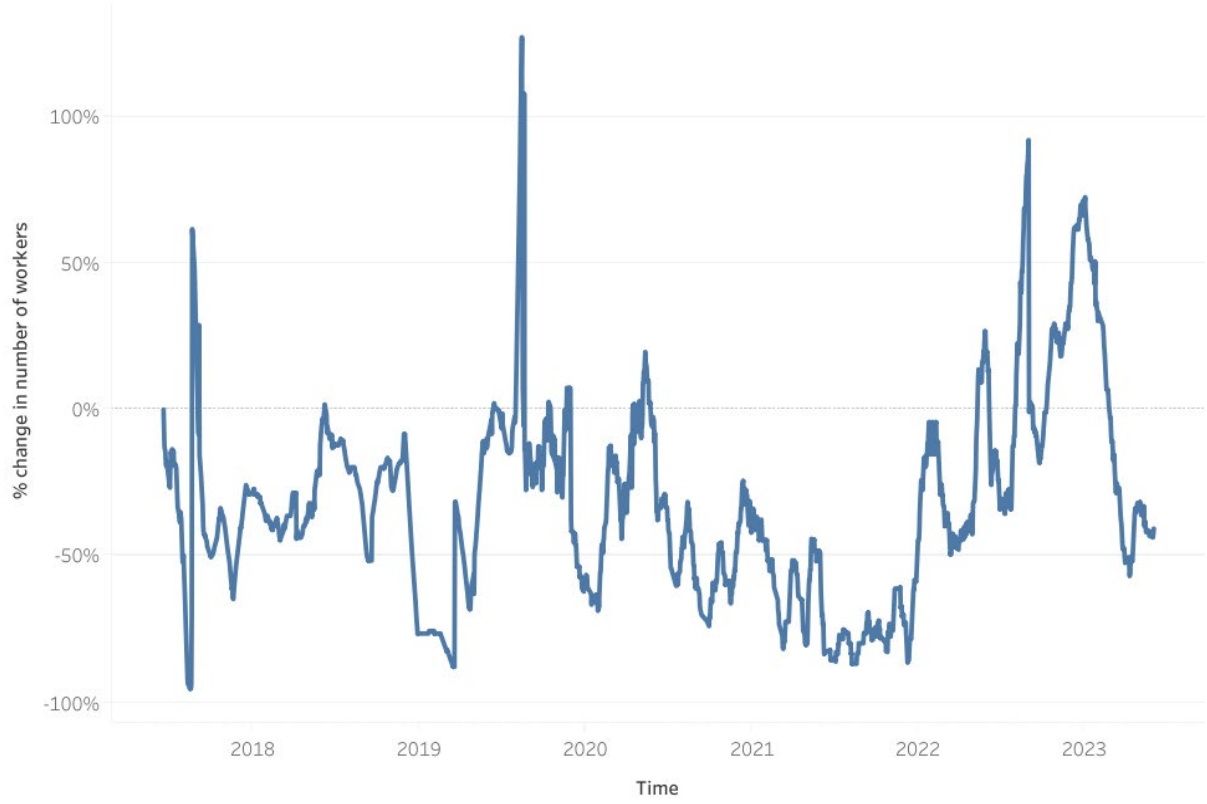
Online work on and off digital labour platforms

Research on online platform work in Israel is scarce, although this form of work has become popular among many Israelis. The Israeli media occasionally report on recent trends, opportunities and challenges in the online work industry, ranging from practical advice on how to build a career[28] to criticising the working conditions on digital platforms.[29] The upcoming section will outline the trends in online platform work in Israel, based on automated data collection.

Prevalence of online work

Based on the data provided by the OLI,[30] online platform work activity in Israel fluctuated between 2017 and 2023, with a slightly downward trend. The volume of platform work was lower by more than 40% in the last measurement in comparison with 2017. Short spikes in workers' activity occurred in the second half of 2019 and in the second half of 2022, but these were followed by rapid declines. The activity of Israeli workers accounted for only 0.05% of the global platform work share during the period measured, which is one of the lowest shares in the SEMED region.

Figure 2. Change in engagement of Israelian online platform workers over time relative to June 2017



Source: Online labour index,[31] accessed in June 2023.

Note: the graph presents the percentage change between the number of active platform workers in Israel on a specific day compared with the number of active platform workers at the start of data collection in 2017, which is used as a reference date. This graph was based on OLI data, which calculated a weighted estimate of currently active workers by periodically sampling

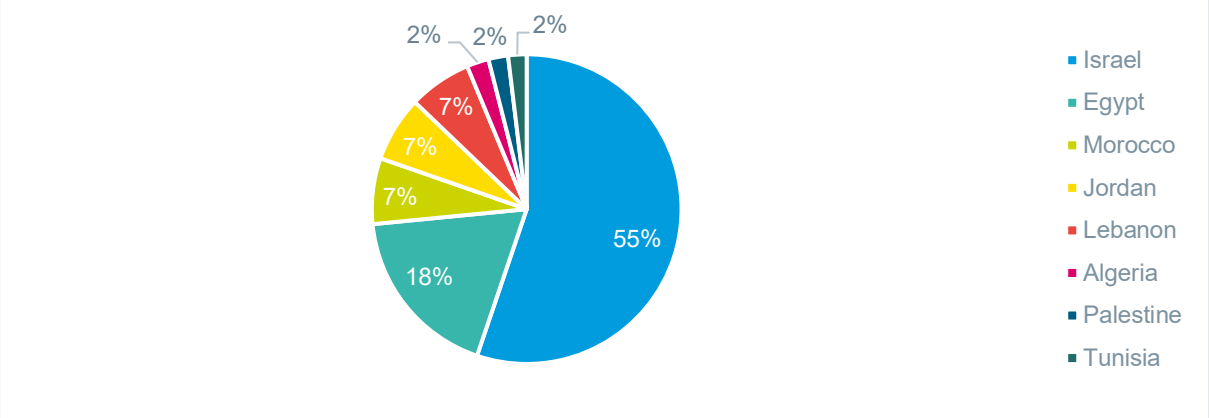
[28] Jerusalem Post (2022). https://www.jpost.com/business-and-innovation/article-689937
29 https://www.haaretz.com/israel-news/2019-11-01/ty-article/.premium/the-gig-economy-a-euphemism-for-19th-century-style-exploitation/0000017f-f6b3-d460-afff-fff781f80000
[30] Online Labour Observatory (2020). http://onlinelabourobservatory.org/oli-supply/
[31] Online Labour Observatory, 2020. http://onlinelabourobservatory.org/oli-supply/

workers on five of the largest online platforms once every 24 hours. The platforms analysed include Upwork, Freelancer, Fiverr, Peopleperhour and MTurk.

The low level of participation by platform workers in Israel may be attributed to the lack of a strong economic incentive to engage with digital platforms. Namely, as data scraped from platforms indicates, the compensation in online labour markets is not sufficiently higher than local wages, and this type of work I accompanied by significant precarity. This will be discussed in detail in the section on working conditions.

Despite accounting for a relatively small global share of platform work and with an overall decrease in platform workers' activity, Israelis still participate significantly in the online platform economy. Instead of working on online platforms, they pay for services provided by online platform workers. The OLI data indicates that 55% of all platform work tasks posted from SEMED region originate from Israel. The following graph (Figure 3) depicts the percentage of the worldwide online labour demand from each country in the SEMED region (although no data are available on Libya). The SEMED region produces a 2.4% share of the global demand, of which Israel by itself represents a share of 1.3%, or 55% of the region's total demand. This aligns with the general observation that the buyers of platform work are mostly located in higher-income countries, while workers are more likely to come from lower-income countries.[32]

Figure 3. Share of the world's online labour demand in the SEMED region

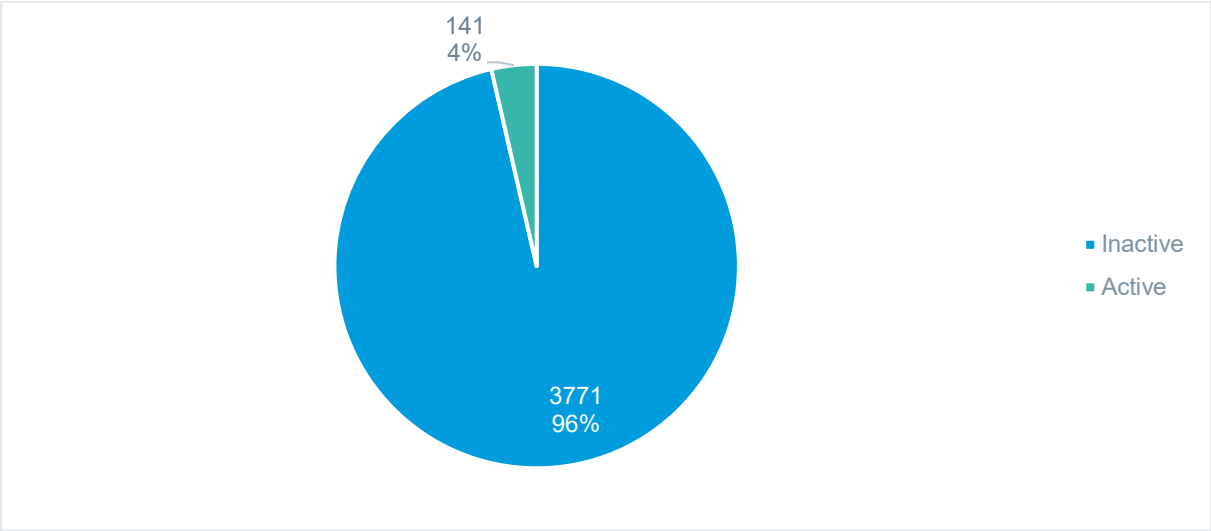


Source: OLI 2020, Online Labour Demand of SEMED region (no data are available for Syria and Libya).

Automated data collection, which included data from the platforms Freelancer, Guru and PeoplePerHour, indicates a low proportion of active platform workers compared with the number of workers registered, as well as a heavy concentration on one platform. Out of the 3,912 registered online workers in Israel on the three targeted platforms, only 4% can be considered active (see Figure 4 below). Among these active workers, the majority (nearly 90% of the total across the three platforms) working using Freelancer. PeoplePerHour and Guru account for 10% and 1% of active workers, respectively (Figures 4 and 5).

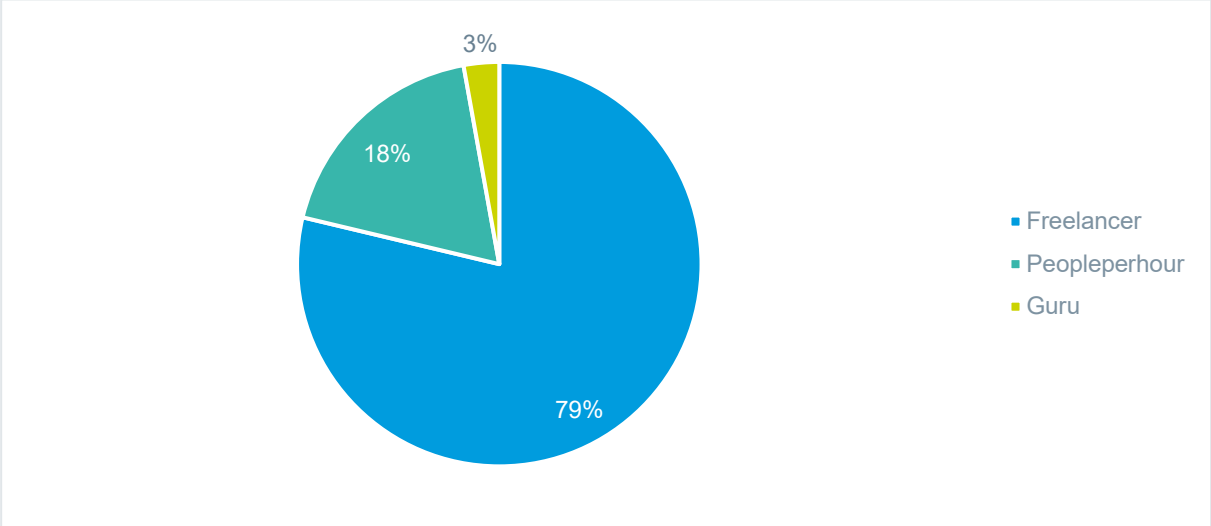
[32] Online Labour Observatory, 2020, http://onlinelabourobservatory.org/oli-demand/

Figure 4. Proportion of active and inactive online platform workers (total number of workers and share of total)



Source: PPMI, based on data from Freelancer, Guru and PeoplePerHour collected in March 2023.

Figure 5. Proportion of active online platform workers by platform



Source: PPMI, based on data from Freelancer, Guru and PeoplePerHour collected in March 2023.

Below, we provide a brief description of each of these online platforms:

- **Freelancer**: a platform that connects freelancers and clients from 247 countries, providing them with tools to help them match the skills or projects they want. According to the Freelancer website,[33] the platform has over 68 million registered users, and almost 23 million pieces of work have been carried out via the platform. Freelancer provides services in more than 1,800 fields (e.g. website design, translation, Python, Photoshop, finance, legal, marketing, e-commerce, programming, writing, etc.).
- **Guru**: a platform on which employers (800,000 worldwide) and freelancers (1,943 in Israel[34]) work. The most popular freelance services provided on Guru in Israel are programming and development, writing and translation, design and art, administrative and secretarial, sales and marketing, engineering and architecture, business and finance, education and training, and legal.

[33] About Freelancer: Company Overview & History | Freelancer
[34] Find and Hire Freelancers in Israel - Guru

- **PeoplePerHour**: a marketplace for hiring top-quality freelance professionals.[35] PeoplePerHour allows free access to detailed freelancer profiles, matches talent to projects, and offers videoconferencing between buyers and freelancers. The platform supports a long list of industries ranging from writing and design to business and technology.

Aside from the platforms above, workers in Israel are also active on several other online labour platforms. The most popular of these are Upwork and Fiverr. Due to the inaccessibility of worker data on these platforms, it is not possible to estimate the number of workers in Israel who are active on them. A short description of the business models of these platforms is provided below.

- **Upwork**: an online platform that connects businesses and freelancers around the world. It is one of the largest online work platforms, with over 18 million registered freelancers and more than 5 million registered clients. The platform offers a wide range of job categories including web and mobile development, design, writing, sales, marketing, and others. Clients can post job listings and search for freelancers based on specific skills and experience. The platform also provides a safe and secure payment system that prevents fraud. Upwork charges a fee for its services, which depends on the size and type of job. Freelancers are charged a percentage of their earnings, while clients are charged a service fee on top of the freelancer's rate.[36]
- **Fiverr**: a global online marketplace for freelance services based in Israel. Fiverr connects freelancers to people or businesses looking for workers in the following areas: graphic and logo design, translation, user interface, user experience or digital marketing. Fiverr's business model is similar to that of Upwork, and is based on taking commission from each transaction that takes place on the platform. Fiverr takes a commission of 20% on the total value of each transaction, which includes the price of the service as well as any additional fees for services such as expedited delivery or other add-on services. Fiverr also generates revenue through various other means, such as offering premium services and subscriptions to both freelancers and clients, as well as providing advertising and promotional opportunities for businesses on the platform.[37]

Attractiveness of online work

The instability of the online work sector in Israel is evidenced by the fact that only around 31% of the people who engage in this kind of work do so full-time, with an additional 41% working online every day, and 23% doing so a few times per week.[38] This shows that online work in Israel can be seen as a type of work that is mostly done part-time and on a regular basis, with more than two-thirds of platform workers working more than one day per week via platforms. A MACRO study examined a nine-month period of earnings on the Fiverr platform and found that only 0.4% of users earned more than USD 55,000, while even fewer earned between USD 10,000 and USD 50,000. These findings confirm a picture of the majority of platform users working only a limited number of hours through online platforms, and indicate that online platforms do not serve as the main source of income for most workers.[39]

However, online work is very attractive for young people. As young people tend to be more flexible, some like to increase their income by supplementing it with additional freelance work. Furthermore, what is also important to them is the flexibility to work from home and the possibility to give greater importance to better work-life balance. Another significant aspect, though not limited to young people, is that many

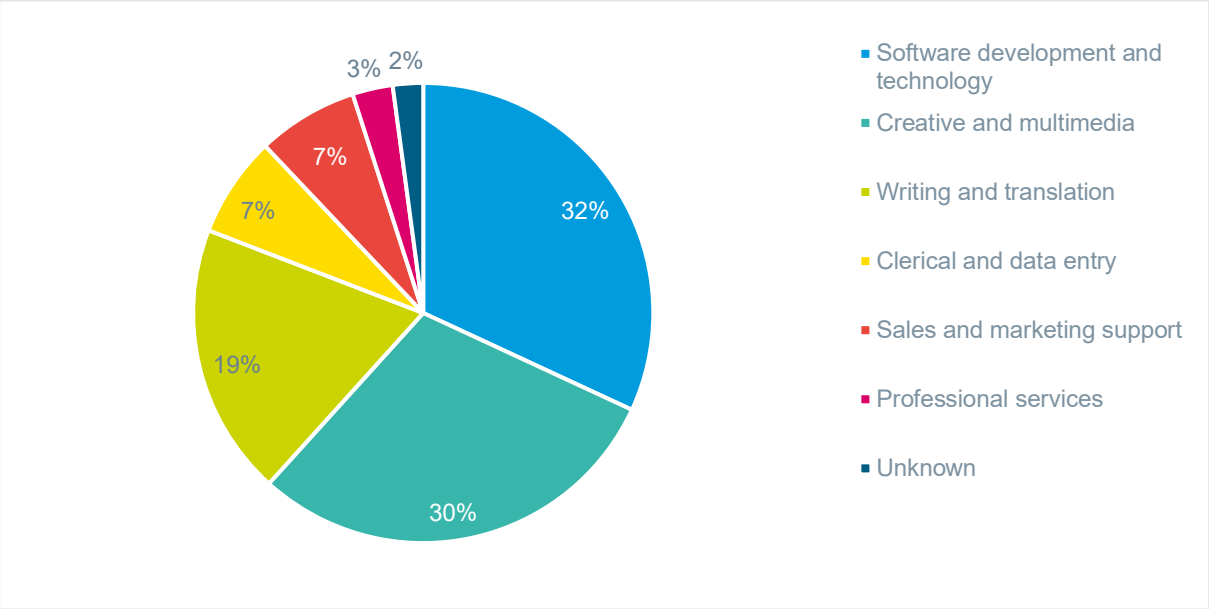
[35] About PeoplePerHour | PeoplePerHour
[36] Upwork, https://www.upwork.com/about
[37] Fiverr, https://investors.fiverr.com/news-releases/news-release-details/fiverr-announces-first-quarter-2023-results
[38] Macro Center for Political Economics, Freelance Work Survey 2021
[39] Macro Center for Politicial Economics, 2021, Codetermination and the Gig Economy, http://www.macro.org.il/images/upload/items/97413130091955.pdf

claim that discrimination becomes less likely when employers or platform operators do not know the identities of their workers.[40]

Online work occupations and worker profiles

As depicted in Figure 6 below, platform workers in Israel are primarily concentrated in three occupations. A 32% share of platform workers are engaged in software development and technology, followed by creative and multimedia, and writing and translation, which account for 30% and 19%, respectively. The remaining workers carry out professional services, clerical and data entry, and sales and marketing support.

Figure 6. Distribution of occupations among active online platform workers



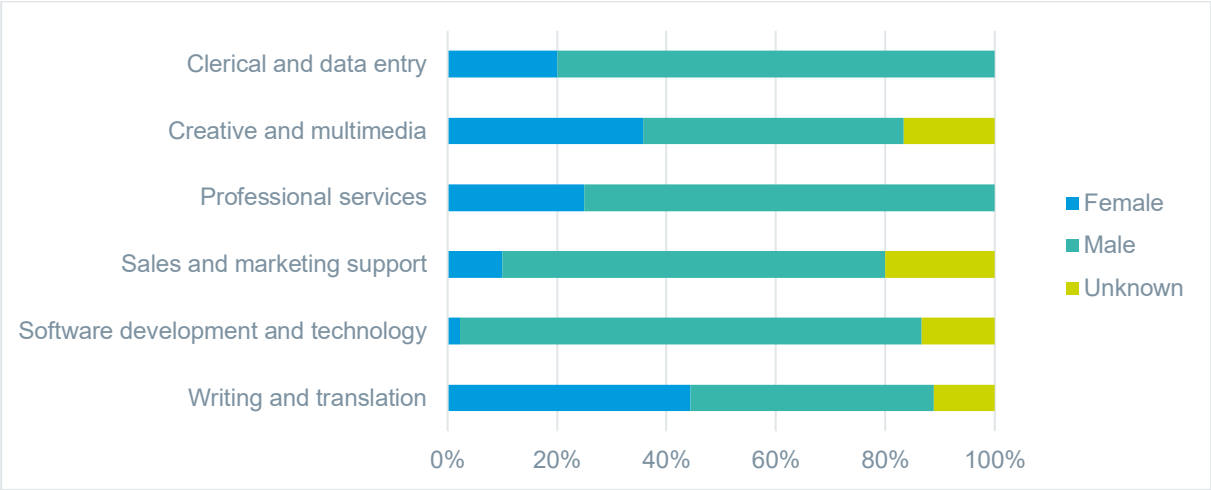
Source: PPMI, based on data from Freelancer, Guru and PeoplePerHour collected in March 2023.

Note: 'Unknown' category shows those worker profiles for which occupation could not be identified.

The majority of active online platform workers in Israel are men. Data gathered from platforms show that men are almost three times more likely than women to work on platforms. Men are over-represented in all occupations aside from writing and translation, where the number of male and female workers is equal. Out of the remaining male-dominated occupations, women have significant representation in creative and multimedia, while they are least well represented in software and technology.

[40] IRRA Israel, New Challenges of Labour Relations 2021, https://fes-org-il-wp.s3.eu-central-1.amazonaws.com/wp-content/uploads/2021/10/21120717/Conference-Publication-English.pdf

Figure 7. Gender distribution of active online platform workers by occupation



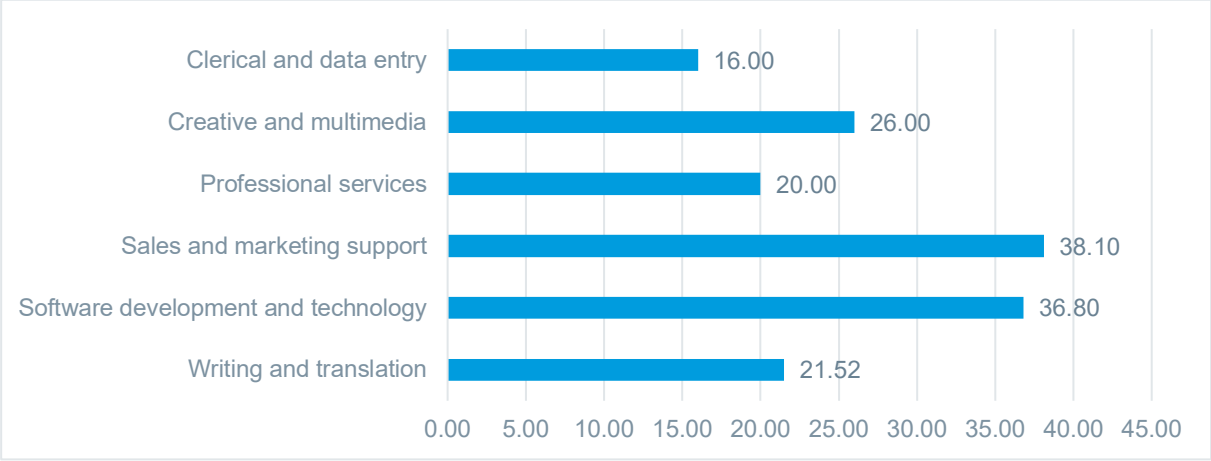
Source: PPMI, based on data from Freelancer, Guru and PeoplePerHour collected in March 2023.

Note: 'Unknown' category shows those worker profiles for which gender could not be identified.

Working conditions

Israel stands out with the highest requested hourly rates on platforms in the SEMED region, which aligns with the fact that it also has the highest local wages. Still, there is significant variation between different occupations in the hourly rates requested by online platform workers in Israel. The highest hourly wages are found in sales and marketing support (USD 38.10) and software development and technology (USD 36.80), while the lowest rates are observed in clerical and data entry, at only USD 16.00. In addition, there is gender disparity in hourly pay, with men demanding higher wages than women. Israeli men on average request USD 28.43 per hour, while women request USD 27.03.

Figure 8. Hourly rates of active online platform workers by occupation



Source: PPMI, based on data from Freelancer, Guru and PeoplePerHour collected in March 2023.

In contrast to other countries in the SEMED region, the hourly wages of Israeli online platform workers do not significantly exceed the national average hourly wages. According to Numbeo,[41] the average net hourly pay in Israel was USD 16.16 in March 2023, which is lower than the average hourly rate on online labour platforms of USD 28.62. Due to the irregular nature of platform earnings, unpaid work on

[41] Numbeo (2023), https://www.numbeo.com/cost-of-living/country_price_rankings?itemId=105

platforms and the absence of worker protections, workers in Israel lack a strong economic incentive to engage in online platform work. This may explain their limited representation on the platforms studied.

On-location platform work

The emergence of on-location platforms in Israel follows global trends. The early appearance of on-location platforms can be traced back to 2010, when the Get-Taxi platform, now named Gett, was launched in Israel. This was followed by arrival of other on-location platform companies such as Uber, Yango, Wolt and 10bis.

Although there has been a significant expansion in the on-location platform economy in Israel, research on this topic remains limited. Some of the main findings from previous research and this study will be outlined in this section of the report.

Prevalence of on-location platform work

The two main types of on-location platform work in Israel are delivery and ride hailing. The most significant delivery companies are Wolt and 10bis.

- **Wolt** is a Finland based start-up founded in 2014 that works as an online network of restaurants, retailers and couriers including food delivery services. It has operated in the Israeli market since 2018. Wolt's business model is based on taking commission from customer orders that are placed through its platform. Wolt charges restaurants a commission on each order that goes through its application. In return, Wolt provides restaurants with access to its large consumer base and offers various tools and services to help them manage their delivery operations. Wolt also generates revenue by charging fees to consumers for each delivery. The exact amount of such fees can vary depending on the location and time of day. In addition, Wolt offers a premium service called Wolt+, which provides customers with free delivery on all orders in return for a monthly subscription fee.
- **10bis** is a Tel Aviv-based company founded in 2000 and bought by Just Eat Takeaway in 2018. 10bis offers online and mobile food ordering services from more than 7,000 restaurants across Israel, and serves both private clients and corporations.[42]

The ride-hailing market in Israel is limited to the one main ride-hailing platform:

- **Gett** (previously named GetTaxi) was one of the first platform work companies created in Israel, in 2010. As mentioned above, its main difference compared with Uber is that drivers on this platform need to be licensed taxi drivers in order to comply with the regulatory framework. In 2012, Gett already had more drivers than any other taxi employer in the country. According to a 2017 report, out of the 25,000 taxi drivers operating in Israel, 8,000 used Gett. It is estimated that Gett generates roughly 50% of taxi drivers' income. The company receives its income in the form of a commission for each ride completed. Some activities performed by Gett include managing daily ride relationships with customers, managing finances, as well as handling marketing and sales sites. Over the years, the company has received widespread recognition among its customers. Shahar Waiser, Gett's CEO, said the company has been operationally profitable since December 2019.

Attractiveness of on-location platform work

Delivery platforms are in general more developed in Israel due to the heavy regulation of ride hailing and local resistance to ride-hailing platforms.[43] Couriers who work using the platform are not employees of the platform or of restaurants, as was common prior to the introduction of such platforms, but are

[42] Just Eat Takeaway.com | Jobs in Israel
[43] MACRO (2021). Codetermination and the Gig Economy, macro.org.il/en/publications/?id=264

freelancers who provide food deliveries via the apps. There is a low barrier to entry to this kind of work, and anyone can become a courier if they secure their own transportation.[44]

Digital platform delivery has grown significantly in Israel over the past decade. However, one barrier to further growth in this activity is the lack of participation of restaurants in the platform economy. Because platforms do not have a wide range of restaurants at their disposal, most platform delivery takes place in Tel-Aviv. This leads to the concentration of competition for customers in a small geographic area. It is estimated that 2.07 million people ordered food in Israel in 2022, which represents a growth rate of 5.6% compared with the 2021 figure of 1.96 million.

The lack of platform companies in the **ride-hailing market in Israel** is influenced by two main factors**:** a high level of competition for customers, and strong regulation. The main example of the latter is UberX, which attempted unsuccessfully to launch its services in the country. First, the UberX business model did not comply with local laws that require all providers of for-profit taxi services to hold licences. Second, the platform met with fierce resistance from the local taxi union (which has more than 20,000 members), but also from the local public transport companies, which wield strong public influence. The lack of ride-hailing platforms has strengthened the market monopoly of local taxi companies, and has helped Gett

On-location platform work occupations and worker profiles

O-location platform work is on the rise globally, and is growing continuously. In 2019, 235 million people were working in the food delivery sector alone. This number is expected to reach one billion in 2025.[45] When it comes to the profiles of on-location platform work in Israel, one needs to distinguish between the transportation sector and the food delivery sector. As the transportation sector is heavily regulated and only drivers with a taxi licence are allowed to offer their services, prices have not dropped, and for drivers it can be a convenient way to find customers easily. The platform Gett is very popular in Israel, and it is expected that taxi drivers make between 50% and 70% of their revenue through this application[46]

The food delivery sector is quite different, as it is subject to almost no regulation. However, expansion for platforms such as Wolt is not very easy. The main focus of work on food delivery platforms is concentrated in and around Tel Aviv, where the density of restaurants is highest by far. Plans to expand into other cities and areas of Israel are more complicated, and have so far not proven very successful.[47] Furthermore, working conditions can be very harsh, as drivers are not unionised and have very few workers' rights. Because drivers are dependent on the major platforms, they have little opportunity to change employers, and the increasing penetration in this sector comes at the expense of riders.

Limited data are available on the profiles of on-location platform workers in Israel. According to Adam Blumenberg from the Histadrut (General Federation of Labour in Israel), although online freelancers are usually highly educated, this is mostly not the case with on-location platform workers. Results from the MACRO study[48] indicate that the gig workers (both online and on-location) are in general young, with 44% of workers aged between 18 and 35. The same study indicates that the level of education of these workers is high, with 54% having a university education, whereas 19% have only graduated from high school. However, this sample also includes online platform workers, and might overestimate education levels. When it comes to the motivations of gig workers to work on platforms, 37% stated independence

[44] According to a study conducted by MACRO, gig workers use platforms on a regular basis. 41% of them worked on the platforms every day of the week, while an additional 23% worked on them a few days per week. Results from the same study indicate that more than one-third of these workers worked between 31 and 50 hours a week, while half of them worked part-time, or from 0 to 30 hours per week. It is important to note that in addition to workers using the on-location platforms Wolt and Gett, the results of this study also include some online Fiverr freelancers, so its findings do not refer exclusively to on-location platform work.
[45] Statista, https://www.statista.com/study/40457/food-delivery/
[46] MACRO, Codetermination and the Gig Economy, macro.org.il/en/publications/?id=264
[47] MACRO, Codetermination and the Gig Economy, macro.org.il/en/publications/?id=264
[48] MACRO (2021). Codetermination and the Gig Economy, macro.org.il/en/publications/?id=264. It should be noted that this study included both online freelancers and on-location workers, and its findings do not distinguish between the two.

as their main reason for platform work. Two other frequently mentioned reasons include the unavailability of other jobs in the sector (16%), and schedule flexibility (13%). Another journalistic research reveals that on-location platform work mostly serves to supplement eroding incomes.[49]

Working conditions

The increasing penetration of digital platforms has brought to public awareness the issues associated with this type of employment.[50] Firstly, from a legal standpoint, these employees are considered independent workers, even though they work for one client. They are not entitled to various social benefits provided to other employees such as insurance, pension, or vacation. This issue has yet to be addressed by Israeli lawmakers.

Furthermore, these workers are unable to unionise, which makes platforms able to unilaterally change employment agreements and deteriorate working conditions (e.g. through reductions in pay). [51] Without a union, it is hard for workers to resist such decisions, as the platforms have no legal obligation towards them. An example of this threat can be seen in the case of Wolt, which made two major changes influencing workers' income. In July 2020, Wolt changed its 'payment per delivery' policy in such a way that couriers will be paid less for short-distance deliveries. Two months later, another change was made – this time to delivery allocation between couriers, which worsened their compensation. Following these changes, groups of couriers protested, but so far without success. According to couriers, their protests failed because they are not allowed to form unions.

[49] https://www.jpost.com/jpost-tech/the-gig-economy-589132
[50] MACRO (2021). Codetermination and the Gig Economy, macro.org.il/en/publications/?id=264
[51] MACRO (2021). Codetermination and the Gig Economy, macro.org.il/en/publications/?id=264

Current regulation, policies and strategic approaches

Labour market, employment and skills development

New forms of work, including online and platform work, require significant adjustments to labour market and educational policies. Although some existing policies are applicable to platform workers, the Israeli government has also introduced novel ones that tackle unique issues associated with these new forms of labour. However, a few measures have been implemented that address online and platform work in particular.

Advances have been made towards regulating the platform economy in Israel. In 2022, a debate took place in the Knesset, the Israeli parliament, on the influence of platform work on labour relations. [52] In the aftermath of this debate, the Ministry of Economics set up a committee to work with employers, trade unions and experts on the gig economy to produce a report. This has already made some initial findings, but the report itself has not yet been published. The main conclusion so far is that there is a lack of data and information regarding the working conditions and numbers of platform workers. The CBS, the Israeli Central Bureau of Statistics, does not currently provide this information, or does so only inadequately. The committee will therefore propose that more information must be gathered and collected, on the basis of which measures can be developed. Taking into account this partial lack of reliable information, it is nevertheless possible to formulate policy implications.

When it comes to employee classification, the Israeli government has already implemented regulations to address the issue of employee classification for on-location platform workers. In fact, recent decisions by the National Labour Court have held that those who perform such work, defined as 'independents' in their contracts for services, were nevertheless workers, because they were an integral part of the work receiver's business, and did not conduct a private business of their own. This will allow the platform workers to gain the same benefits and social protection as regular employees. However, the timing of the implementation of relevant regulations still needs to be discussed.

With regard to online freelancers and platform workers, in 2018, Israel passed the Freelancer's law, which regulates relations between freelancers and their clients. This law requires clients to pay freelancers within 30 days of completing the work and provides freelancers with the right to terminate contracts with clients online. However, the law contains no provisions that regulate the employment status of online platform workers.

Israel has a minimum wage law that applies to all workers, including on-location platform workers. Employers are required to pay their workers at least the minimum wage, which is updated annually. The current minimum wage in Israel is NIS 5,571.75 per month, or around NIS 30 per hour (2023). This equates to around EUR 1,400 per month or EUR 7.3 per hour. [53]

On-location platform workers in Israel are also protected by laws governing working hours. The maximum number of working hours per week in Israel is 43, and a maximum of working hours per day is 9. Employers are also required to provide their workers with rest periods and breaks.[54]

To enable people to integrate into and remain part of the workforce in Israel, there is a rising need to adapt the skills and knowledge of those entering the workforce, as well as those who are already working, to the changing needs of the labour market. An estimated 600,000 workers in Israel are employed in jobs that are at high risk of profound transformation over the next few years. Education

[52] Knesset, 2023, https://main.knesset.gov.il/en/news/pressreleases/pages/press161221w.aspx
[53] Israel National Insurance (2023), https://www.btl.gov.il/English%20Homepage/Mediniyut/GeneralInformation/Pages/MinimumWage.aspx
[54] Government of Israel, Workers' Rights Handbook, https://www.gov.il/BlobFolder/generalpage/foreign_workers_rights_booklets/he/Zchuton_ENG_0817_1.pdf

researchers in Israel list the main skills that will be required in the changing labour market of the 21st century: critical thinking, problem solving, independent learning, self-direction, digital and technology literacy, collaboration, information management, and creativity.[55] As 29% of the Israeli youth do not participate in state-sponsored secondary studies (i.e. pursuing an academic degree) or training, it is already very challenging for these people to develop their skills.[56] Government efforts need to be strengthened to prepare these people for the upcoming challenges of the labour market.

Digitalisation

Israel' government has implemented several important initiatives aimed at the digital transformation of the economy.

In 2013, through the Ministry of Social Equality, the Israeli government identified an acute need to establish a comprehensive national digital policy, and passed a resolution to set up the 'Digital Israel' initiative. The goal of this initiative is to 'leverage information and communication technologies with the aim of narrowing social disparities, increasing economic prosperity and creating a more efficient and smarter government administration'.

Under the initiative, the first multi-annual plan was developed for 2017–2022, focusing on closing gaps, accelerated economic growth and smart governance.[57]

- Closing gaps: the main goal here is to make social and public products available remotely, to allow service provision to the entire population, particularly in rural areas (for example, remote learning and remote medical services).
- Accelerated economic growth: in order to leverage digitalisation and accelerate economic growth, three strategic goals have been set:
    - 1. Promote digital industries and businesses, develop digitalisation-based industries and encourage information-based innovation. In addition, businesses in Israel should increase their online activity to improve competitiveness, open up new potential markets and create new opportunities for growth.
    - 2. Develop the labour market for the digital age, focusing on aligning digital skills in the education system with the needs of the labour market. This will be achieved by increasing the use of online professional training, expanding employment opportunities in the digital age by removing the obstacle of distance, and training professional personnel in the fields of digitalisation and ICT.
    - 3. Support the development of infrastructure (such as broadband and fibre-optics) and promote an enabling digital work environment.
- Smart governance: improving public products and promoting an advanced interface with government ministries that is available and convenient, in order to reduce bureaucracy. Three objectives have been set:
    - Making national and local government accessible by improving government services to citizens and reducing bureaucracy, as well as digitalising local government, making government databases available to the public, and making it easier to conduct business.

[55] Ministry for Social Equality (2017), דיגיטלית לאומית תכנית (www.gov.il)
[56] Workforce 2030, Challenges and Opportunities, https://www.mevaker.gov.il/En/publication/Documents/2021-WORKFORCE-2030.pdf?AspxAutoDetectCookieSupport=1
[57] Ministry of Social Equality, Digital Israel Headquarters, 2017, https://www.gov.il/BlobFolder/news/digital_israel_national_plan/en/The%20National%20Digital%20Program%20of%20the%20Government%20of%20Israel.pdf

- Improving digitalisation in the internal work of the government; for example, in government acquisition, through information-based policies and increased information sharing among government ministries, as well as innovation and entrepreneurship in the government.
- Improving public products (such as education, health and welfare) by digital means.

It appears that Digital Israel initiative did not develop an ordered mode of operation, and did not set indicators in 2017. A report by the State Controller (2020) suggested that this was the result of budgetary factors, and that measurement began in the middle of 2019. The report further suggested that the process had been delayed, encountered many obstacles, and was de-prioritised in favour of other issues.[58]

Meanwhile, the Israeli Ministry of Labour and Social Affairs offers training in digital skills to allow workers to take advantage of opportunities in the digital economy. It operates a few small pilot programmes targeted at workers in these new forms of work. For example, it offers training to particular groups (people with disabilities, Arab women, ultra-Orthodox Jews) on using online trading platforms and making a living in the global online market.[59]

Lastly, the Digital Talent Pilot Programme has been developed to answer the emerging need for digital skills such as SEO, PPC, social media and data analysis. Each year, 3,000 new jobs are created in Israel for such specialisations.[60] The Digital Talent programme takes advantage of this demand and strives, firstly, to train the most vulnerable communities in digital professions and, secondly, to draw on unused human resources from populations poorly represented in high-tech industry in Israel such as Arabs, Israelis of Ethiopian descent, Haredim, and Israelis with disabilities. The Digital Talent programme:

- supports the formulation of the training curriculum according to the current needs of Israeli employers, with participation of vocational colleges and industry leaders;
- provides updated curricula and advanced teaching methods; and
- identifies those digital professions in high demand, quickly develops training, and supplies industry with qualified workers.

[58] Reichman University (2022). https://www.runi.ac.il/media/jk4di1sc/promoting-and-developing-digital-transformation-in-israel-toward-2030.pdf
[59] OECD (2023). Economic survey of Israel.
[60] 23576ISRAEL_13191_SDGISRAEL.pdf (un.org)

Policy implications

Online and platform work have already begun to transform Israel's work environment, and prospects for growth in these sectors are significant. The COVID-19 pandemic played a huge role in encouraging the development of work on platforms. Because these new forms of work involve both challenges and opportunities, it is essential that decision-makers adapt their policy strategies to the new reality. This process has only just begun in Israel, as discussions on this topic have only emerged recently. Furthermore, policymakers are reluctant to take action on these labour market trends, as they have not yet had a significant impact. However, they appear to be aware of the need strategic planning for the future. Several important trends and policy implications can be identified in relation to these new forms of work.

Challenges and opportunities of the current situation

- Both online and on-location platform work could offer a real opportunity for youth, who appear to be disadvantaged in their job prospects. To achieve this, the facilitation of various promotion and upskilling programmes is necessary.
- While online work offers higher-skilled work opportunities and flexibility, on-location work is mired with poorer work conditions, as well as a lack of skills development and career advancement opportunities. Both types of platform work, however, suffer from a lack of adequate legal regulation.

Gaps in the existing strategic and policy approaches

- Since the issue has only been addressed politically since 2022, the legal regulation of platform work is not yet well-developed, with the exception of platform work in the transport sector. There is an urgent need for action and the necessity to establish laws and rules that strengthen the rights and obligations of platform workers.
- The new EU directive concerning platform work could serve as a good example for Israel.[61][62] This directive should guarantee basic working rights for the growing sector of online work across the EU. In particular, the directive determines the employee status of platform workers, thereby ensuring labour rights.

Implications/possible measures for regulation

- Israel should invest further in improving its internet infrastructure. Although such investments are costly, they offer great potential for paying off in the future, not only when it comes to online work, in different economic sectors.
- The biggest problem involved in regulating the platform economy in Israel is a lack of information and data. The government has now set up a committee, but this must first gather information in order to make informed conclusions about the state of the country's platform economy.
- In the context of Israel, it could be beneficial increase social coverage for the self-employed. Unemployment benefits could also be introduced for them, or the right to holidays. This would

[61] Council of the European Union (2018). https://data.consilium.europa.eu/doc/document/ST-14582-2018-INIT/en/pdf

[62] Euractive.com (2023). EU countries nail down common position on platform workers directive, https://www.euractiv.com/section/gig-economy/news/eu-countries-nail-down-common-position-on-platform-workers-directive/

also then apply to workers in the platform economy, who could secure more stable working conditions through such legislation.

- Authorities in Israel should establish adequate legal regulations governing the employment status of online platform workers. This would safeguard workers' basic rights and obligations, as well as defining career advancement opportunities and opportunities for skills development, etc.
- To harness the benefits of the platform economy, and particularly of online platform work, the government should facilitate digital skills development among young people. In particular, the Ministry of Education should act to reduce the digital gaps among the Arab and ultra-Orthodox population, as these groups contribute the highest shares of NEETs in Israel.

Summary

Israel has the strongest economy in the SEMED region, despite experiencing slow growth and pressure on its fiscal system in recent years. Employment in the country is above pre-COVID levels, and there is a historically high vacancy rate. In spite of high immigration rates, there are shortages of workers, particularly in Israel's rapidly growing high-tech industry. Although significant gender disparity can be seen when it comes to labour market opportunities, Israel still fares better than most countries in the region in this respect. Digitalisation and internet usage rates are also comparatively high, and the country's ICT sector is especially well developed.

The available data indicate that the volume of online platform work in Israel is currently stagnant, and may potentially be shrinking. The low participation of Israelis in platform work may be attributed to the relatively low compensation on offer compared with local wages, which provides few incentives for Israelis to work on online platforms. However, in comparison to the rest of the region, people in Israel are overrepresented when it comes to buying services from online platform workers, making up 55% of the entire region's demand for online labour. Platform workers in Israel primarily engage in occupations such as software development and technology, creative and multimedia, and writing and translation. In general, men are overrepresented in platform work, with the exception of writing and translation. Platform workers in Israel request higher hourly rates than in the rest of the SEMED region, but there is a gender disparity in pay, with men demanding higher wages than women.

The on-location platform economy in Israel has witnessed significant growth with the emergence of platforms like Gett, Uber, Yango, Wolt, and 10bis. Despite this growth, delivery platforms remain mostly concentrated in Tel Aviv. Ride-hailing platforms encountered issues with entering the local market due to strong regulation and significant public resistance. This has resulted in the ride-hailing market monopoly of local taxi companies, with Gett as the dominant platform in the market. On-location platform workers in Israel use platforms regularly, with independence, schedule flexibility, and the unavailability of alternative jobs being their key motivations. These workers tend to be mostly young and highly educated. However, working conditions for on-location platform workers raise concerns due to their lack of access to social benefits and the absence of unions that would help workers to challenge deteriorating working conditions.

Only a few policies and regulations have been implemented to address the working conditions of online and platform workers in Israel, as the platform economy is not a top priority for the current government. The Israeli government has implemented regulations regarding employee classification for on-location platform workers, ensuring that they receive benefits and social protection. The government also initiated a law that regulates payments between clients and online platform workers. Even so, further challenges remain in regulating the status of platform workers, as well as in vocational training and the upgrading of digital skills, particularly among disadvantaged populations. The Digital Israel initiative aims to narrow these social disparities, promote economic growth, and enhance governance through digitalisation, but its progress has been hindered by budgetary factors and delays. The Ministry of Labour and Social Affairs also provides training in digital skills for workers in the digital economy, targeting vulnerable groups.

Although platform work offers some opportunities for workers in Israel, many challenges need to be addressed; primarily, the unclear legal status of platform workers and the protection of their labour rights, but also digital skills development. To address these challenges, the government should take steps to define the legal status of online and platform workers, and to expand the integration of digital skills into education curricula and reduce digital gaps in marginalised sectors. These policies could be based on the experiences of other countries, particularly the EU.

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List of interviewees

Name	Organisation	Title	Date of interview
Adam Blumenberg	Histadrut – General Federation of Labour	Vice President of Economics and Policy	19 April 2023
Roy Cohen	Lahav – Association of Self-Employed Workers	Chairman	23 April 2023
Eli Eisenberg	Technion – Israel Institute of Technology	Professor	24 April 2023
Ilan Levin	Israel Ministry of Finance	Managing Director of Payments and Work Agreements	09 May 2023
Rivka Werbner	Israel Ministry of Labour	Chief Labour Relations Officer	15 May 23