

NEW FORMS OF WORK AND PLATFORM WORK IN CENTRAL ASIA

Country profile: Kyrgyzstan

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INTRODUCTION

The present report is exploring new forms of work in Kyrgyzstan, particularly online work on and off digital platforms and on-location platform work.¹ It investigates the prevalence of these new types of work, their appeal to workers, workers' profiles, working conditions, the current regulatory landscape, as well as the relevant policy implications. This report is one of four reports developed within the scope of the ETF research project in Central Asia, which also encompasses studies in Tajikistan, Kazakhstan, and Uzbekistan.

The report on Kyrgyzstan was developed based on data obtained through desk research, scraping of online labour platforms and stakeholder interviews. Firstly, desk research included a review of official statistics, policy and legal documents, digital platform websites, specific regulations, project reports, but also relevant literature, research papers, studies, news articles, etc. Secondly, quantitative data on online platform workers was obtained through web scraping of data from some of the most popular online labour platforms in the region, as well as through the existing Online Labour Index database. Thirdly, data from the desk research and online labour platforms was integrated with the information gathered through interviews with the most relevant local stakeholders. Interviews were conducted with the policymakers, representatives of employers' organisations, as well as specialists and practitioners in the field of employment and labour market, digitalisation and digital labour platforms. The development of the report, including the empirical research, encompassed the period from May to October 2023.

The report is structured in the following way: (i) outline of the country's economy, labour market, youth statistics, Internet and digitalisation, (ii) review and analysis of online work on and off digital platforms in Kyrgyzstan (iii) review and analysis of on-location platform work in the country (iv) identification of the current regulations, policies, and strategic approaches related to the new forms of work, as well as (v) outline of the main policy recommendations.

¹ Definitions of terms used in the report are provided in the Glossary.

SETTING THE SCENE

Main economic indicators

The Kyrgyz Republic is a lower-middle income, landlocked country.² In 2022, the growth rate of the Kyrgyz economy reached 7% (following a substantial decline in 2020 when the GDP contracted by over 8%) and the GDP amounted to 919 billion Kyrgyzstani som (KGS) i.e. around \$10.2 billion. The engines of economic growth for 2022 were notably the production of basic metals (increase by 21.5%), wood and paper products, and printing activities (increase by 27%).³

The GDP per capita noted a significant increase and amounted to \$1,607 in 2022.⁴ Regarding inflation, it rose significantly from 1% in 2019 to 15.3% in January 2023.⁵ The outlook for 2023 is that the GDP growth is expected at 4.5% by the Kyrgyz Cabinet of Ministers.⁶

Labour market

The population of the Republic was estimated in 2021 at 6,692,000 people, with economically active people accounting for 60.1% of the population in 2022. The overall employment rate in 2022 amounted to 57.1% (43.1% for women and 71.8% for men) and was roughly the same for the last 5 years. The overall unemployment rate in 2022 was 4.9%, a downward trend since 2012 when it was 8.4%.⁷ The informal employment in the country is very large and, according to the estimates of the National Statistical Office, is approximately 67% of the employed.⁸

Migration processes have a significant impact on the country's economy and labour market. According to the Federal Service of State Statistics of the Russian Federation, in 2021 there were 711,240 Kyrgyz migrants in Russia, 477,000 of whom were labour migrants.⁹ It is estimated that women in Kyrgyzstan constitute an increasing share of emigrants. This is due to a variety of factors, including the simplification of labour migration procedures between the member states of the Eurasian Economic Union (EAEU), limited work opportunities in the country, family reunification due to earlier migration of men, and an entry ban for men migrants who broke the law. Therefore, women's labour migration is often seen as the only way to improve a family's living standards.¹⁰ Kyrgyzstan's economy is highly dependent on remittances from Russia. In 2020 total remittances were equivalent to 31% of GDP and were comparable to or even larger than the share of the country's exports of goods and services.¹¹ Migration processes in the Republic, characterised in the previous years by a negative value of the migration balance, have changed the trend to positive as from 2022. The change is firstly due to the COVID-19 pandemic, and secondly due to the geopolitical situation, which caused a decrease in outgoing migration of Kyrgyzstan's residents to Russia. The largest positive increase in migration to Kyrgyzstan in 2022 was from Russia, Tajikistan and Uzbekistan, as well as non-CIS countries.¹²

² The World Bank Group in the Kyrgyz Republic. Available [here](#).

³ National Statistical Committee of the KR. (2023). Economic growth amounted to 7% at the end of 2022, available [here](#).

⁴ World Bank. GDP per capita (current US\$), Kyrgyz Republic, available [here](#).

⁵ OCHA situation report, Price Monitoring for Food Security in the Kyrgyz Republic, Issue #64 | 27 January 2023, available [here](#).

⁶ 24.KG. March 2023. Cabinet expects economic growth in Kyrgyzstan of 4.5 percent in 2023, available [here](#).

⁷ KIESE database.

⁸ National Statistical Committee of the Kyrgyz Republic, 2021, available [here](#).

⁹ Federal Service of State Statistics, 2021, available [here](#).

¹⁰ Lola Abdukadyrova and Olga Studenko, 'The Pandemic Played a Cruel Joke on Us': The vulnerabilities of Kyrgyz women migrant workers in Russia during COVID-19, available [here](#).

¹¹ Dilip Ratha and Eung Ju Kim, Russia-Ukraine Conflict: Implications for Remittance flows to Ukraine and Central Asia, 2022, available [here](#).

¹² National Statistical Committee of the KR. (2022). Migration inflow, outflow, available [here](#).

According to the HeadHunter Kyrgyzstan platform¹³ three key problems have been identified in the labour market by the end of 2022. The first is the lack of qualified workers with secondary or vocational education and qualified specialists with higher technical education. The second problem is the mismatch between the salary expectations of candidates and what the companies can offer. The third problem is that currently more than 80% of all vacancies are concentrated in Bishkek. This is due to the high level of urbanisation and the concentration of headquarters of large and medium-sized businesses there, which in turn stimulates internal migration in the country to the capital.

Youth statistics

The share of youth from 14 to 28 years old in the population structure of Kyrgyzstan is significant and amounted to about 24% at the beginning of 2022 (a decrease from 30% over the past 10 years). At the same time, the increase in the birth rate of the population in the country showed a share of 31.2% for children aged 0-13 years, which will naturally create pressure on the development of education and training of young people in the coming years.¹⁴ The government understands this situation and therefore budget expenditures on education still occupy the largest part of the total state budget, averaging around 23% in 2022 (or 7% of GDP).¹⁵

There has been a decline in the labour force participation rate of young people aged 15–29, from 49% in 2017 to 47.7% in 2022. The overall employment rate of this age group was, despite minor fluctuations, roughly the same in the period 2017-2021 i.e. 43.8% (with a huge, 30-percentage-point difference between women (28.9%) and men (58.2%) in 2022. Youth unemployment (aged 15-29) was 8.2% (11.4% for women and 6.5% for men) in the same year.¹⁶ Young people occupy a special place in the informal sector of the economy, as they are more likely to have difficulty in finding formal employment; according to the estimates, almost 80% of the total number of employed youth work in the informal sector.¹⁷

The proportion of NEETs (aged 15-24) among young people is high and has not changed much in the period 2017-2021, remaining at 19-21%. At the same time, the proportion of women in this category of youth was around 2.4 times higher than that of men throughout the whole period 2017-2021.¹⁸ The share of NEETs in 2022 was 19.3%; 11.2% among young men and 27.7% among young women.¹⁹

School to work transition is challenging, due to the lack of articulated demand on the labour market, low wages and lack of professional experience. Those are also the main reasons that lead to long-term unemployment among young people. Corruption is also a major factor inhibiting economic and labour market development.²⁰ The Corruption Perceptions Index published by Transparency International showed improvement i.e. a constant increase in scores from 24 points in 2012, to 27 points in 2022, and Kyrgyzstan is now ranked 140th out of 180 countries.²¹

Internet and digitalisation

The number of Internet users in Kyrgyzstan has been growing steadily in recent years, reaching 78% of the population in 2021.²² This growth has been driven by a number of factors, including the increasing

¹³ Abdieva B. (2022). What are the top three challenges facing the labour market in Kyrgyzstan? The Economist. November 11, 2022, available [here](#).

¹⁴ Национальный статистический комитет Кыргызской Республики (2022). ЦЕЛИ УСТОЙЧИВОГО РАЗВИТИЯ И МОЛОДЁЖЬ В КЫРГЫЗСКОЙ РЕСПУБЛИКЕ. Available [here](#).

¹⁵ <https://www.stat.kg/en/opendata/category/5335/>

¹⁶ KIESE database

¹⁷ See footnote 11.

¹⁸ See footnote 11.

¹⁹ KIESE database

²⁰ Kasymova S.M., Azimov I.N., Zhoroieva A.G. (2021). Main directions and ways to improve employment in the Kyrgyz Republic. Topical Issues of Modern Economics, No. 4. pp. 338-345. Available [here](#).

²¹ <https://www.transparency.org/en/cpi/2022/index/kgz>

²² [Individuals using the Internet \(% of population\) - Kyrgyz Republic | Data \(worldbank.org\)](#)

affordability of smartphones and the expansion of mobile Internet coverage. As of the start of 2023, the total of 10.78 million cellular mobile connections were active in the country, equating to 161% of the total population.²³

According to national statistics, the length of fibre-optic lines doubled from 2017 to 2022. The third-generation (3G) technology for mobile networks is available in much of the country, with 98% of Kyrgyzstan's territory covered, while the fourth-generation (4G) services cover 97% of inhabited localities.²⁴ In August 2022, the government gave mobile service providers permission to begin testing the fifth-generation (5G) technology, and the first test was successfully completed in Bishkek²⁵ but this technology is yet to be adopted.²⁶ Nevertheless, good quality fixed broadband services are not yet generally available outside the main population centres.²⁷

Despite being more readily available, the mobile Internet connections are slower and of lower quality than fixed ones. According to September 2023 data from Ookla's Speedtest, the average download speed on mobile Internet connections was just 26.09 megabits per second (Mbps), compared to 52.22 Mbps on fixed-line connections. The country ranks 88th in the world in this test in terms of mobile Internet speed, and 93rd in terms of fixed broadband Internet speed.²⁸ Kyrgyzstan lags behind neighbouring Kazakhstan in terms of average speeds but compares favourably to other Central Asian countries.²⁹

In the Worldwide Mobile Data Pricing rating of mobile Internet cost for 2023, Kyrgyzstan ranks high, 8th place out of 237 countries, for the cheapest mobile Internet with an average price of USD 0.17 per 1GB.³⁰ At the same time, fixed broadband prices remain steep. Prices offered by Internet service providers in Bishkek, where the ICT infrastructure is well-developed and competition is greater, are lower than in rural areas. The monthly price of a 5Mbps fixed broadband subscription in Bishkek as of the date of writing the report was 513 som (USD 5.74).³¹ The monthly price for the same subscription in the rural regions was 600 som (USD 6.72), e.g. Batken Region.³²

²³ [Digital 2023: Kyrgyzstan — DataReportal — Global Digital Insights](#)

²⁴ State Communication Agency. Report on Performance for 2022, <https://nas.gov.kg/dp/ezhegodnye-otchety-agentstva/>.

²⁵ 24.kg, Testing of 5G started in Kyrgyzstan, August 9, 2022, https://24.kg/english/241842_Testing_of_5G_technology_started_in_Kyrgyz...

²⁶ Manas News, 5G is planned to be introduced in Kyrgyzstan as early as 2023, November 10, 2022, [5G внедряют в Кыргызстане в 2023 году \(manas.news\)](#)

²⁷ Investor Perceptions and the Broadband Sector, A survey by the European Bank of Reconstruction and Development, Central Asia and Kyrgyz Republic, 2020/21

²⁸ [Kyrgyzstan's Mobile and Broadband Internet Speeds - Speedtest Global Index](#)

²⁹ See at: [Speedtest Global Index — Internet Speed around the world — Speedtest Global Index](#)

³⁰ [Worldwide Mobile Data Pricing 2023 | 1GB Cost in 237 Countries \(cable.co.uk\)](#)

³¹ Tariff Plans-Bishkek City, Jet, 2023, [г. Бишкек — «JET»](#)

³² Tariff Plans-Batken Region, Jet, 2023, [Баткенская область — «JET»](#)

ONLINE WORK ON AND OFF DIGITAL LABOUR PLATFORMS

New forms of employment are hardly noticeable in the media, public discussions, and political debates in the Kyrgyz Republic. In the media, there are few articles³³ that discuss the rise of new forms of employment, such as online work, freelancing, and gig work. These articles often highlight the potential benefits of these new forms of employment; however, they also often discuss their challenges. It is important that trade unions are also included in this discussion through the prism of transformation of the informal economy into the formal economy. This topic is new to the media, and the discussion and first publications mentioning this topic and discussing its problems appeared in the Kyrgyz media around 2020.

The growth of online work in Kyrgyzstan is having a number of positive impacts on the economy. It is creating new jobs, increasing incomes, and reducing poverty.³⁴ The COVID-19 pandemic has also led to an increase in the number of people working as online freelancers because the pandemic has made it more difficult for people to find traditional jobs, and many people have turned to freelancing as a way to make a living.

Prevalence and trends of online work

The available official statistics do not contain data on the volume and market share of the labour platforms workers in Kyrgyzstan. Online work on and off digital labour platforms is not yet widespread in Kyrgyzstan.

Freelancers from Kyrgyzstan work in a variety of sectors, including business, education, healthcare and beauty industry, non-profit, technology, and many more. In accordance with the interviews conducted for this report, some of the most popular digital labour platforms for online platform work used in Kyrgyzstan include the following:

- Upwork, for which the Upwork Kyrgyzstan community has been created on the Telegram³⁵ channel with around 2,000 members. Upwork offers a wide range of services such as dispatch, writing, editing, design, development, marketing, and customer service.
- Freelancer, which offers a wide range of services, similar to Upwork.
- Toptal, a platform for programmers with a good rating, and it provides work opportunities with a fairly predictable workload.
- Fiverr, a platform that offers a wide range of services. It is a micro-tasking marketplace where freelancers can offer their services for as little as €5 for tasks such as writing product descriptions, creating social media graphics, and doing micro research.
- Guru, which offers a wide range of services, similar to Upwork.

Online labour index (OLI) data³⁶ indicates that platform work in Kyrgyzstan experienced a delayed start compared to other countries. Although the OLI measurement began in the summer of 2017, the first platform work activity in Kyrgyzstan was observed a year later. Worker activity in Kyrgyzstan remained relatively stagnant, with occasional peaks. The highest peak occurred in the second half of 2022, showcasing an astonishing increase of nearly 20,000% compared to the initial measurement. However, in 2023, there was a significant drop in number of workers, returning to the previous level. This pattern

³³ See references across the text

³⁴ Akchabar news. September 2022. Work without borders, or How to work abroad without leaving home, available at <https://www.akchabar.kg/ru/article/economy/rabota-bez-granic/>

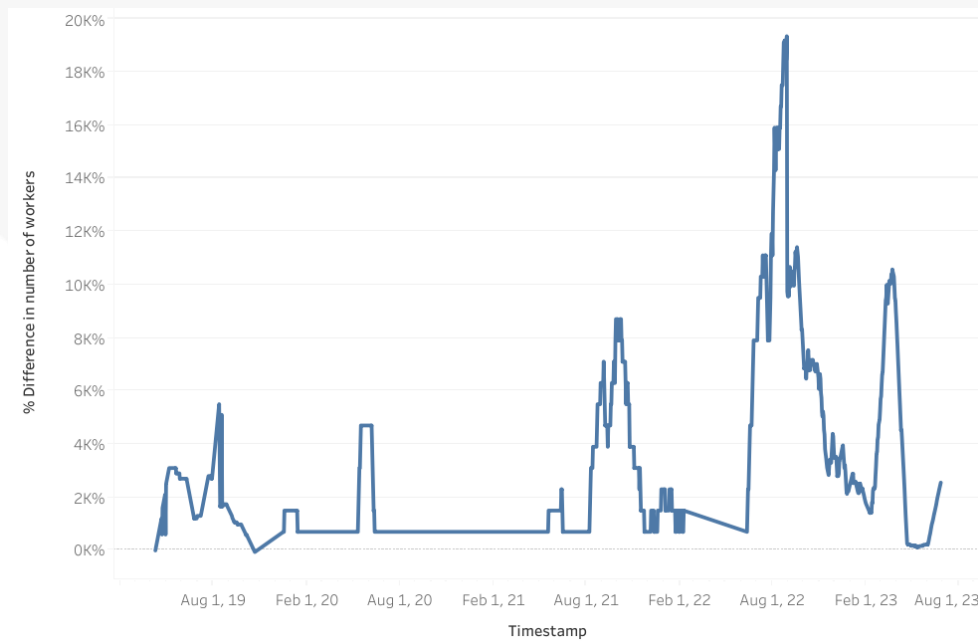
³⁵ Telegram chat for Upwork's workers in Kyrgyzstan, available at <https://t.me/upworkkyrgyzstan>

³⁶ <http://onlinelabourobservatory.org/oli-supply/>

to a certain extent reflects the global online labour supply curve as measured by OLI with two notable exception. Firstly, it appears that the online platform work emerged later in Kyrgyzstan than in most countries. Secondly, the peak in 2022 is much sharper compared to the global online labour supply curve.

One plausible explanation for the sharp increase of online platform workers in 2022 (which is also supported with anecdotal evidence from focus groups) could be attributed to the high immigration of freelancers from Russia, who represent the third-largest population of freelancers worldwide.³⁷ Due to international sanctions in 2022, Russian citizens experienced issues with accessing international platforms and receiving payments from abroad. This led many of them to migrate to neighbouring countries, including Kyrgyzstan, to continue their work on platforms such as Upwork, Toptal, Behance, Freelancer.com, Fiverr, Workana, 99designs, Guru, and similar. According to the Ministry of Digital Development, from January to May 2022, 71,351 Russian citizens got registered on the territory of the Kyrgyz Republic.³⁸ Since 2022, this flow has intensified and acquired a clear format of relocation and job search for specialists who cannot perform their work in their homeland in a quality manner. Indicative of the development of the IT sphere due to the influx of migrants is the fact that the US corporation Apple moved most of its employees from its Russian office to Kyrgyzstan by the end of summer 2022.

Figure 1. Change in engagement of online platform workers from Kyrgyzstan on English language platforms over time



Source: Online labour index³⁹

Note: The graph presents the percentage change between the number of active workers from Kyrgyzstan on a specific day compared to the number of active workers at the start of data collection in 2018, 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 workers on five of the largest online platforms once every 24 hours. Platforms included are Upwork, Freelancer, Fiverr, Peopleperhour and MTurk.

The trends observed on OLI data for Russian language platforms align with the findings from English language platforms, showing a significant surge in work volume in the middle of 2022. This further strengthens the assumption that the increased activity of platform workers can be attributed to Russian

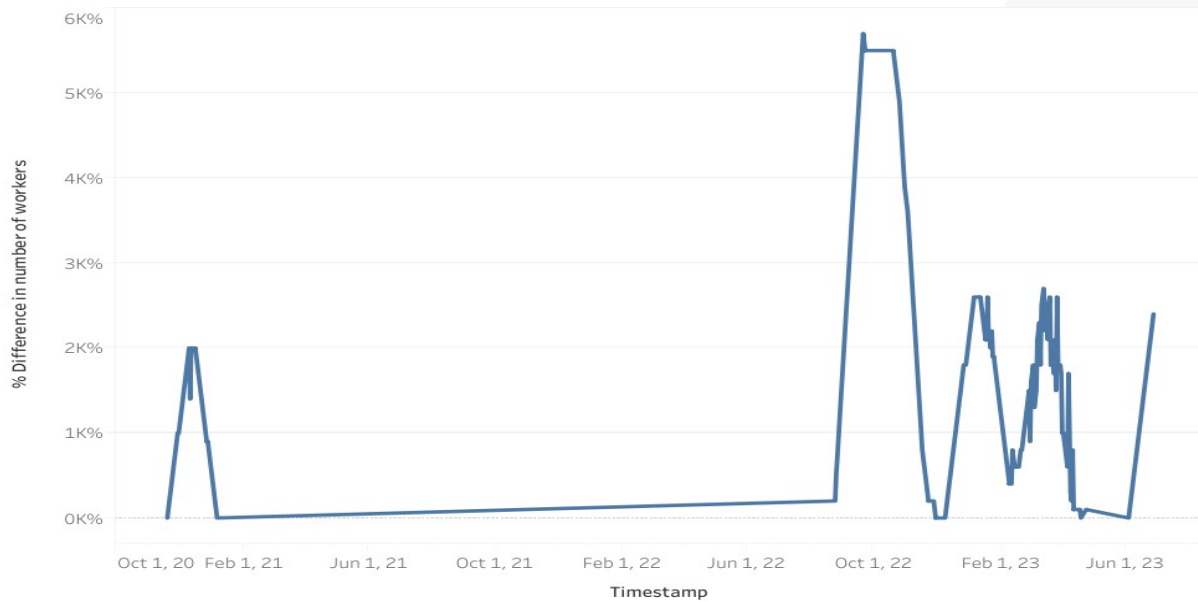
³⁷ <http://onlinelabourobservatory.org/oli-supply/>

³⁸ Akchabar. May 2022. Migration of change. How many Russians have moved to the Kyrgyz Republic since the beginning of the year, available at <https://www.akchabar.kg/ru/article/opinion/migraciya-peremen-skolko-rossiyan-pereehali-v-kr-posle-nacha/>

³⁹ <http://onlinelabourobservatory.org/oli-supply/>

immigrants in Kyrgyzstan. Notably, the number of new vacancies on Russian language platforms did not increase, only the supply of workers.

Figure 2. Change in engagement of online platform workers from Kyrgyzstan on Russian language platforms over time



Source: Online labour index⁴⁰

Note: The graph presents the percentage change between the number of active workers from Kyrgyzstan on a specific day compared to the number of active workers at the start of data collection in October 2020, 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 workers on three Russian language online platforms once every 24 hours. Platforms included are Freelancer.ru, Freelancehunt.ru and Weblancer.ru.

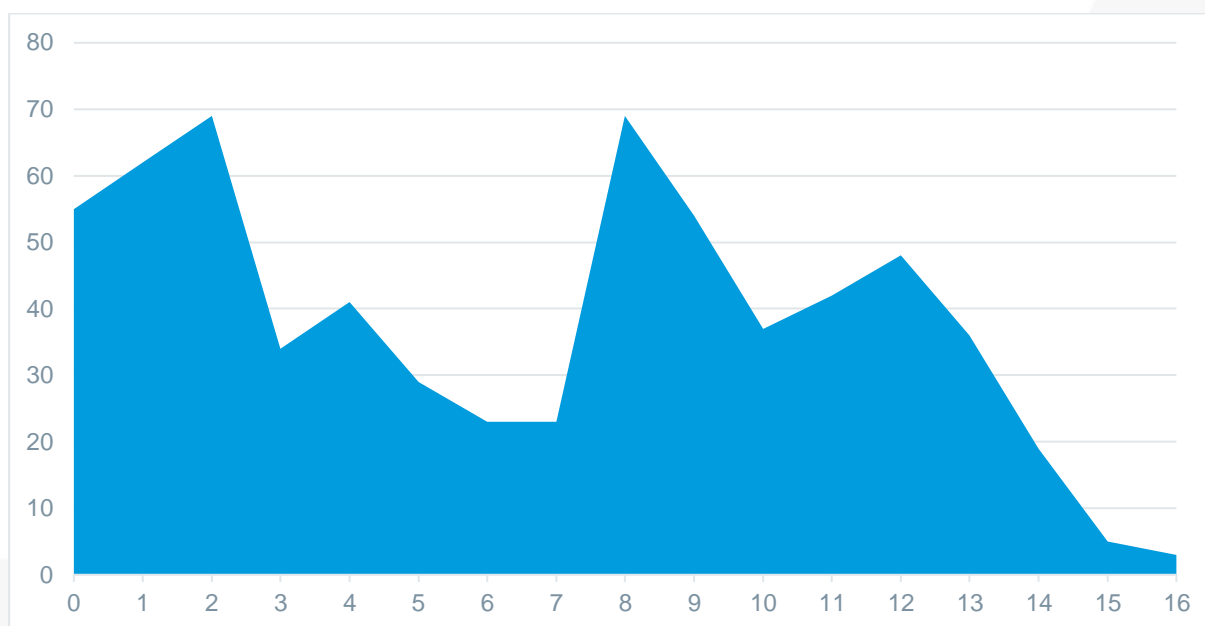
The research for this study also involved data scraping from three prominent digital platforms widely used in Kyrgyzstan: English language Freelancer and Guru, and Russian language Weblancer. A total of 1,324 registered profiles from Kyrgyzstan were identified on these platforms. Among these, approximately half of the profiles are engaged in work on the Russian language platform, Weblancer, while 37% and 14% are active on the English language platforms Freelancer and Guru, respectively. This finding highlights the significant popularity of Russian language platforms in Kyrgyzstan. Notably, out of the 1,324 registered profiles, only 7% can be classified as active.⁴¹

The figure below illustrates that online workers from Kyrgyzstan have been actively working on the Weblancer platform for an extended period. Approximately half of them have been engaged on the platform for seven years or more, and some have remained active for as long as 16 years. Moreover, the figure demonstrates that the platform continues to attract new members, as evidenced by the creation of a large number of profiles in the past two years.

⁴⁰ <http://onlinelabourobservatory.org/oli-supply/>

⁴¹ Active workers are those who completed at least one task on the platforms.

Figure 3. Distribution of time that workers were registered on Weblancer platform



Source: PPMI, based on data from Weblancer collected in April 2023

Attractiveness of online work

There are a number of factors that are driving the growth of online work in Kyrgyzstan. As it was mentioned above, one factor is the increasing availability of the Internet access. Online work primarily depends on Internet connectivity and access to appropriate devices, making it more accessible in regions with reliable Internet infrastructure, and many freelancers prefer to leave Bishkek and settle around Issyk Kul lake.

Another factor is the growing number of digital labour platforms that are available in Kyrgyzstan: world's largest freelancing platforms, platforms originating from outside Kyrgyzstan, and purely national platforms for the domestic market. The latter is the most interesting phenomenon, with platforms such as Freelancer.kg and Selva.kg, which are growing fast in Kyrgyzstan, including programming, design, freelance writing, translation, data entry, etc. These platforms allow businesses and organisations to post jobs and find freelancers who are in Kyrgyzstan. Freelancers can then bid on the jobs and the business or organisation can choose the freelancer who they believe is the best fit for the job. However, the emerging market of digital labour platforms in the Kyrgyz Republic is still relatively small and mostly relies on the business-to-consumer (B2C) model, which represents the core of the digital labour market.⁴²

There are also several global trends that are typical for young people working online in Kyrgyzstan and attract them to online freelancing. Young people are more likely to use technology to work online than older generations, they are more comfortable with technology, and they are more likely to have access to it. Young people are more likely to want flexibility in their work arrangements: to be able to work from home, set their own working hours, and take breaks when they need them. The desire for independence is also an important factor, young people are more likely to want to be their own boss, to set their own goals, to make their own decisions, and to be responsible for their own success. Finally, interviewees note an emerging phenomenon associated with the development of the Internet and gig economy when school graduates do not continue to study at colleges and universities, but complete 2-3-month courses and immediately start working online or on-location by finding jobs on the digital labour platforms in the

⁴² Solidarity Center 2022.

hope to build competencies through learning by doing.⁴³ In this area one can find many organisations of additional professional education both national and localised in Kyrgyzstan, which offer full-time, blended and distance learning: IT-Academy, Skillbox, GeekBrains, etc. There is even a search engine [It.Limon.kg](https://it.limon.kg)⁴⁴ for this purpose. Completion of such courses is usually paid for by the applicant.

There are a number of ways that people in Kyrgyzstan can learn about online work opportunities and start working online on and off platforms. A number of online job boards (HeadHunter, Lalafo, Instagram (vacancy_bishkek), JobLab) list, among others, also remote and freelance work opportunities. A list of more than 30 most popular online job search services, including through digital job search platforms, can be found on Kaktus Media,⁴⁵ which includes specialist websites, websites with job search sections, mobile applications, Telegram feeds and chat rooms. Another common way to learn about online work opportunities is through social media as a number of bloggers⁴⁶ run their own pages and post popular information about their successes, focussing on online work. Apparently, this is a good way for newcomers to connect with other online workers and learn about new opportunities. Attending industry events or connecting with people in a certain professional field is a great way to learn about online work opportunities, too. Yet another way is word-of-mouth, by asking friends, family, and colleagues if they know of any online work opportunities. And finally, it is possible to find job opportunities on the job recruiting portal, for example, Headhunter.⁴⁷

However, there are also some barriers to accessing online work. One is that it can be difficult to find reliable and well-paying jobs.⁴⁸ The online job market is very competitive, and many online jobs pay very little, especially entry-level positions, and employers often find it possible to pay lower wages without repercussions. In addition, the online job market is less regulated in Kyrgyzstan as the traditional one. Also, despite the growing availability and opportunities of online work, many people still do not know that they can work from home and earn their living.⁴⁹

Furthermore, the growth of remote earning opportunities has led to an increase of demand for workers with the skills needed to work remotely, such as strong digital skills and the ability to work independently. There is a lack of skills among the Kyrgyz workforce that are in demand for online work. Many people do not have the skills that are required for jobs such as writing, editing, programming, and design.⁵⁰

In addition to this, there is a lack of trust in online work platforms among Kyrgyz workers. Some people are concerned about the security of their personal information and the fairness of the payment system.⁵¹ The regulation of online work in Kyrgyzstan is still evolving.⁵² This can make it difficult for workers to know their rights and responsibilities. In general, there is a lack of support for online workers in Kyrgyzstan, there are no laws or regulations that protect the rights of online workers, and there are no government programmes to help them find work or develop their skills.

Online work occupations, skills and worker profiles

Based on the data collected for this study, the occupations of online platform workers from Kyrgyzstan are unevenly distributed. The highest shares of workers are found in the fields of creative and media, which accounts for 34% of the workforce, followed by software development and technology with a 30%

⁴³ Interview with a representative of High Technology Park.

⁴⁴ <https://it.limon.kg/profiles/?hl=ru>

⁴⁵ https://kaktus.media/doc/439336_kak_nayti_raboty_v_kyrgyzstane_spisok_onlayn_servisov.html

⁴⁶ For instance, Dinara Ruslan, CEO Codify, available at <https://www.instagram.com/dinaruslan00/>

⁴⁷ Web Portal HeadHunter.kg, available at <https://bishkek.headhunter.kg/>

⁴⁸ 24.kg. February 2022. Pros and cons of remote work, or how to work remotely in Kyrgyzstan, available at https://24.kg/obschestvo/222886_plyusyi_iminusyi_udalenki_ili_kak_rabotat_distsionno_vkyrgyzstane/

⁴⁹ 24.kg. February 2022. Pros and cons of remote work, or how to work remotely in Kyrgyzstan. available at https://24.kg/obschestvo/222886_plyusyi_iminusyi_udalenki_ili_kak_rabotat_distsionno_vkyrgyzstane/

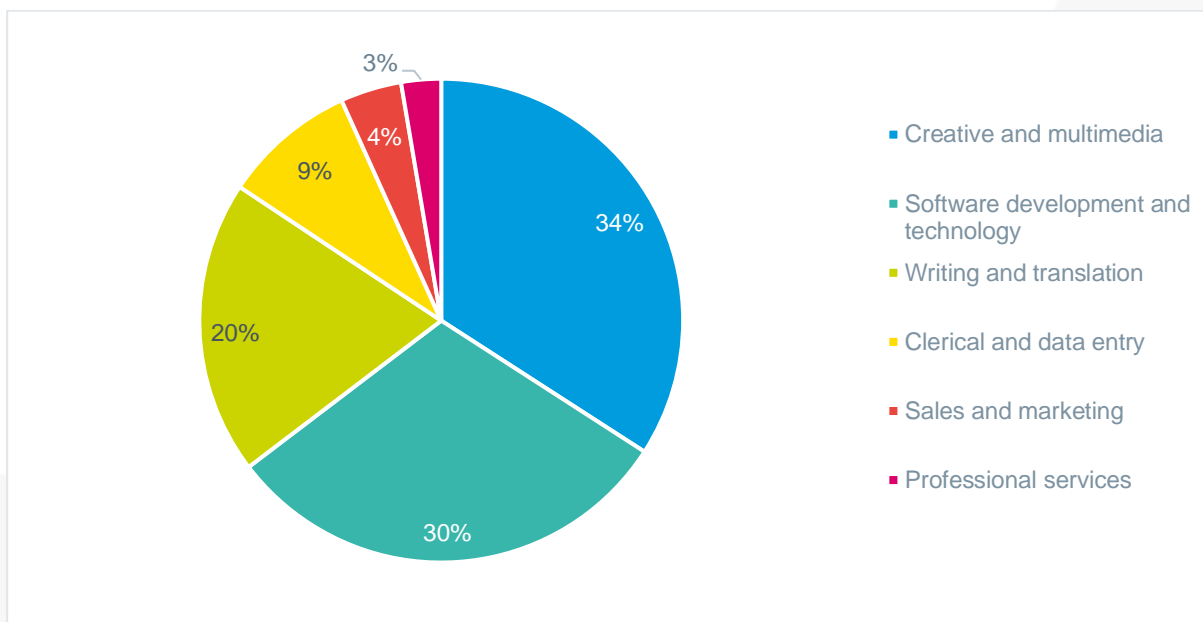
⁵⁰ Interview with a representative of High Technology Park

⁵¹ Interview with a representative of High Technology Park

⁵² Solidarity Center. (2022). Roadmap to Justice: How Kyrgyzstan's Platform Economy Workers Can Stand for Their Rights, available at <https://www.solidaritycenter.org/wp-content/uploads/2022/10/KYRZRussian.September-2022.pdf>

share, and writing and translation with a 20% share. The remaining online platform workers are engaged in clerical and data entry, sales and marketing, and professional services, in that order.

Figure 4. Distribution of occupations among registered online platform workers from Kyrgyzstan

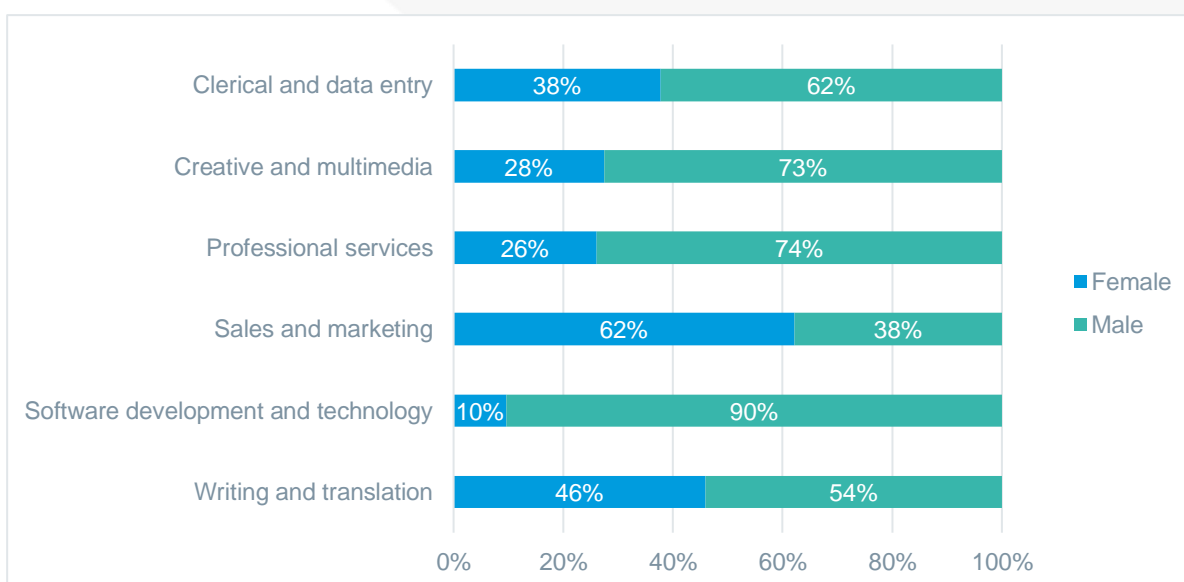


Source: PPMI, based on data from Freelancer, Guru and Weblancer collected in April 2023

Note: It was not possible to determine occupation for 26% of the profiles. These profiles were not included in this graph.

The majority of online platform workers in Kyrgyzstan (72%) are men. However, women constitute the majority in the sales and marketing field, representing for 62% of the total share. They also have a significant presence in writing and translation, with 46%. Conversely, women are least represented in the software development and technology area, comprising only around 9% of share in this occupation.

Figure 5. Gender distribution of registered online platform workers by occupation

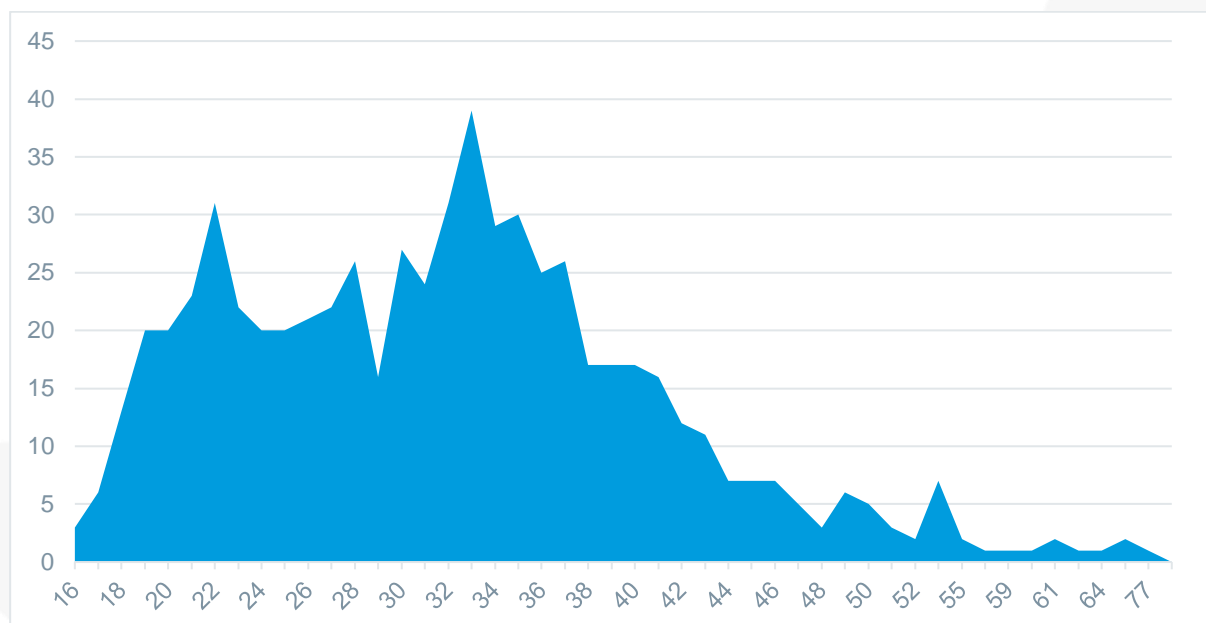


Source: PPMI, based on data from Freelancer, Guru and Weblancer collected in April 2023

Note: Gender could not be determined for around 14% of the profiles, such data is excluded from the graph

Online platform workers from Kyrgyzstan are predominantly young. The figure below highlights that the majority of workers registered on the Weblancer platform are between 20 and 40 years old. However, it is worth noting that there is also a significant presence of both older and younger workers.

Figure 6. Distribution of age of registered online platform workers from Kyrgyzstan



Source: PPMI, based on data from Weblancer collected in April 2023

Finally, based on focus group discussions conducted with Central Asian freelancers, people working on online labour platforms tend to be highly educated. However, there is no reliable data on educational attainment and skills of online platform workers in Kyrgyzstan specifically.

Working conditions

A major challenge in freelancer working conditions is that workers on digital labour platforms are often not protected by labour laws.⁵³ The platforms do not provide paid holidays, sick leave, or pay during downtime between projects. The popularity of online freelancing among the youth contributes to the persistence of the informal economy in the country, as young people, when they start working (or rather moonlighting), are less concerned with having formal labour contracts, employment benefits, etc.

While this emerging digital labour market has huge potential for growth, it requires regulation from the state with the participation of trade unions and all interested parties⁵⁴: *“The fundamental position of the Republic’s trade unions is to formalise the labour relations of employees of digital platforms through the conclusion of employment contracts, thus reducing other contractual forms of relationship of a civil law nature. It is the existence of an employment contract that brings all participants in business processes into the formal economy. In informal employment there are no regulated labour relations”.*

Apart from employment status, the other aspects such as contractual and/or working relationships in online work on and off digital labour platforms vary significantly. Freelancers and online workers perform contractual work with well-known worldwide digital labour platforms that verify the worker’s existence, personal data, bank account, VAT, etc. to ensure authenticity. Such platforms sometimes require registration documents for the right to carry out this work, confirming that the employee is in a legal field and pays taxes on financial income. The Civil Code Law regulates such activity in the form of individual

⁵³ Solidarity Center. (2022). Roadmap to Justice: How Kyrgyzstan’s Platform Economy Workers Can Stand for Their Rights, available at <https://www.solidaritycenter.org/wp-content/uploads/2022/10/KYRZRussian.September-2022.pdf>

⁵⁴ Interview with a representative of the Mining and Metallurgical Trade Union of the Kyrgyz Republic

entrepreneurial activity or self-employment. The difference between the two is the type of work, the list of which is set by the Cabinet of Ministers, and the fact that self-employment does not involve hiring other workers. Conversely, national or Russian digital labour platforms impose smaller contractual obligations, and either transactions occur without any documents, or there are aggregators focussed on small jobs in translation or editing, that require only registration and a bank account. As it was mentioned above, no special labour legislation for online platform workers has been adopted, so these workers operate under general labour legislation.

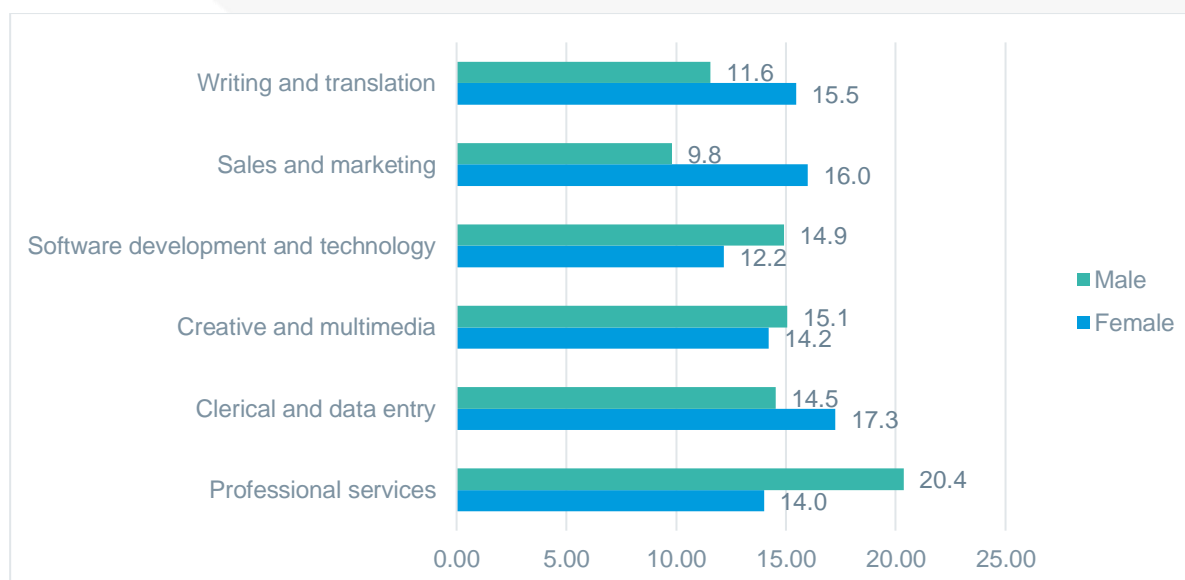
The potential to earn on digital platforms is attractive for Kyrgyz workers. On average, online platform workers from Kyrgyzstan request a rate of USD 14.92 per hour. This figure is significantly lower on the Russian language platform Weblancer, where the average rate is USD 8.12 per hour. The rates on Freelancer and Guru are slightly higher at USD 14.94 and USD 16.36 per hour, respectively.

It is important to highlight that the average platform rate is around nine times higher than the local average hourly net wage, which stood at around USD 1.3 in 2020.⁵⁵ This substantial difference suggests that online labour platforms offer a significant earning opportunity for workers from Kyrgyzstan. However, it is crucial to acknowledge that these figures may not be directly comparable, as requested hourly rates can differ from the actual earnings received by workers, and platform earnings tend to be irregular. Additionally, securing jobs on platforms may involve a considerable amount of unpaid work.

There are notable gender differences in earnings among online platform workers in Kyrgyzstan (see figure below). Women tend to request higher hourly rates compared to men, with women requesting an average rate of USD 15.13 compared to USD 14.37 for men. Women specifically request higher rates in the fields of clerical and data entry, sales and marketing, and writing and translation. This is in contrast with previous research where men earn more than women on online labour platforms.⁵⁶

Regarding the variation of hourly rates across occupations, professional services and clerical and data entry occupations exhibit the highest rates. They are followed by creative and multimedia, software development and technology, sales and marketing, and writing and translation, respectively.

Figure 7. Hourly rates of online registered platform workers by occupation and gender



Source: PPMI, based on data from Freelancer, Guru and Weblancer collected in April 2023

⁵⁵ <https://www.stat.kg/en/opendata/category/112/>

⁵⁶ <https://www.worldbank.org/en/topic/jobsanddevelopment/publication/online-gig-work-enabled-by-digital-platforms>

ON-LOCATION PLATFORM WORK

On-location platform work is also not very visible in Kyrgyzstan due to little media coverage of the topic, and it is not a major focus of public discourse or policy debates. There are a few reasons for this. First, on-location platform work is still a relatively new phenomenon in Kyrgyzstan, and one may find the first mentions and messages only in the past few years that businesses have begun to offer on-location platform work opportunities in the country.⁵⁷ Second, on-location platform work is often seen as a low-paying, low-skill job, as many of the jobs that are available through on-location platforms are entry-level positions, such as delivery or ride-hailing.⁵⁸

Such an understanding in the society and such a style of doing business create serious obstacles for the transition of these businesses to formal and visible conditions – such employees, jobs and incomes are practically invisible to the state. For businesses, on-location platform work helps them to reduce their costs and improve their efficiency. For workers, on-location platform work offers them the flexibility and independence that they desire. As on-location platform work becomes more popular, it is likely that it will become more visible in the media, public discourse, and policy debates. This is because it is a significant economic force that has the potential to impact a large number of people.

Prevalence and trends of on-location platform work

As on-location platform work is a relatively new phenomenon, there is limited data available on its prevalence. However, useful insights into the presence of this type of work could be made by looking into specific platforms operating in the country. The most popular digital labour platforms for on-location platform work used in Kyrgyzstan may be divided into the following groups:

- Ride-hailing platforms. Yandex.Go (Russia) is the most popular ride-hailing platform in Kyrgyzstan. Similar platforms but less popular are NAVI Taxi (Kyrgyzstan), Indrive (California), BiTaxi (Namba Taxi) - Bishkek Taxi (Kyrgyzstan), Jorgo Taxi (Kyrgyzstan). Their business models are based on a commission model. When a rider requests a ride, a platform charges a commission on the fare. The commission rate varies depending on the city and the time of day from 10% to 15%. In addition to its commission model, platforms also generate revenue from advertising. These ads can be seen by riders and drivers when they are waiting for a ride. Yandex also generates revenue from its food delivery service. All these platforms are based on technology-enabled platforms. The companies use their mobile apps to connect riders and drivers. This technology allows companies to operate at a lower cost than traditional taxi companies. Yandex Go used multiple proxies until 2023 in the Kyrgyz Republic, which made its business not very transparent, providing only management of orders, financial transactions, and communication between customers and taxi drivers. After the State Antimonopoly Service issued a warning to Yandex Go for overpriced taxi services, the management situation has improved significantly by autumn 2023.⁵⁹ Yandex Go has improved all services, introduced a unified management and opened its rules and statistics on price formation,⁶⁰ clarified its methods of working with drivers and passengers (from this year the driver and each passenger in the car are additionally insured during the journey for 800 thousand KGS i.e. approx. €8,500).⁶¹ In addition, the company has made its taxation arrangements in Kyrgyzstan and is recognised as the

⁵⁷ Federation of Trade Unions of Kyrgyzstan. (2023). Platform employment and its impact on workers - the position of the Federation of Trade Unions of Kyrgyzstan, available at <https://fpk.kg/novosti/platformennaja-zanjatost-i-ee-vlijanie-na-rabotnikov-pozicija-federacii-profsojuzov-kyrgyzstana/>

⁵⁸ Federation of Trade Unions of Kyrgyzstan. (2023). Platform employment and its impact on workers - the position of the Federation of Trade Unions of Kyrgyzstan, available at <https://fpk.kg/novosti/platformennaja-zanjatost-i-ee-vlijanie-na-rabotnikov-pozicija-federacii-profsojuzov-kyrgyzstana/>

⁵⁹ <https://economist.kg/novosti/2023/08/04/v-iandieks-go-prokommientirovali-prietienzii-gosantimonopolii-po-povodu-tsien-na-taksi/>

⁶⁰ <https://www.tazabek.kg/news:1956466>

⁶¹ <https://www.akchabar.kg/ru/article/business/yandeks-taksi-kak-populyarnyj-agregator-izmenil-rynok-passaz/>

best taxpayer in the country in 2023.⁶² Popularity of Yandex.Go is a consequence of the quality of mobile software associated with the Yandex Maps navigator, money invested in promotion, and proper systematic market entry since November 2017: when the service launched in Kyrgyzstan, Yandex.Taxi attracted around two dozen Bishkek and Osh-based taxi services.⁶³

- Food and goods delivery platforms. There is a similar application from Yandex - Yandex.Eats, but it is less popular than the market leaders in this area – Glovo (Spain) and Namba One (Kyrgyzstan). The most common business model is a commission model. In this model, a food delivery platform charges a commission on each order placed through the platform. The commission rate varies depending on the platform, but it is typically between 15% and 30%. The platforms can use a subscription-based model when customers pay a monthly subscription fee to access the platform. This gives them unlimited access to the platform and the ability to place as many orders as they want. In addition, they use an advertising-based model, i.e. a platform generates revenue by selling advertising space on its website or app. Advertisers can pay to have their ads displayed to customers who are using the platform.
- Platforms for various services. This is a group of platforms for offering numerous on-location services such as beauty and health, construction and repair, transportation, repair and maintenance of machinery, education and courses, business services, cleaning, party organisation, etc. The rapidly developing B2C and C2C connectivity is also represented by such market leaders as Lalafo (Ukraine and UK), Diesel Forum (Kyrgyzstan), Bazar.kg (Kyrgyzstan), Doska.kg (Kyrgyzstan), and Tez Sat (Kyrgyzstan). These platforms typically operate on various business models, however, their spread and popularity are based on a model where platforms offer not only the connection of buyers and sellers of services but also goods. There is also a commission-based model on each transaction or job completed through the platform. For example, a freelance platform may charge freelancers a percentage of their earnings or charge employers a fee for accessing and hiring freelancers. As in the case of online work these platforms also use the advertising model as a revenue source. They allow businesses to promote their services through ads displayed on the platform. These ads can be targeted to specific users or based on search queries. The platforms offering job or service listings can display sponsored job postings or service provider ads.

The largest cohort of platform workers is represented by taxi drivers, for whom some figures are already available. A survey⁶⁴ found that over 10,000 people in the capital are now engaged in passenger transportation by private vehicles. Only 42% of them work officially with a patent. Of the taxi drivers, from 50 to 70% work for Yandex Taxi, according to different estimations.⁶⁵ This company does not have an official representative office in Kyrgyzstan, but works through its partners, the Connection Service Organisations. Officially, as of the date of the survey, there were 44 of them registered in the country, but in reality, there are more than 140. At the same time, no more than 40 pay taxes. Moreover, the online platform gives orders, and defines working conditions and responsibility for violations and sanctions, but it does not take any responsibility in case of risks. Full responsibility is placed on the drivers themselves.

The COVID-19 pandemic has had a significant impact on the on-location platform work industry. The pandemic has led to a decline in traditional employment opportunities, as businesses have been forced to close or operate with reduced capacity.⁶⁶ This has led to an increase in the number of people looking

⁶² <https://www.akchabar.kg/ru/news/yandeks-go-priznan-luchshim-nalogoplatelshikom-kyrgyzstana/>

⁶³ KLOOP. April 2018. Yandex.Taxi: How a popular online taxi service works in Kyrgyzstan, available at <https://kloop.kg/blog/2018/04/16/yandeks-taksi-kak-populyarnyj-servis-onlajn-zakaza-taksi-rabotaet-v-kyrgyzstane/>

⁶⁴ Solidarity Center. (2022). Roadmap to Justice: How Kyrgyzstan's Platform Economy Workers Can Stand for Their Rights. Available [here](#)

⁶⁵ Solidarity Center. (2022). Roadmap to Justice: How Kyrgyzstan's Platform Economy Workers Can Stand for Their Rights. Available [here](#); Federation of Trade Unions of Kyrgyzstan. (2023). Platform employment and its impact on workers - the position of the Federation of Trade Unions of Kyrgyzstan, available at <https://fpk.kg/novosti/platformennaja-zanijatost-i-ee-vlijanie-na-rabotnikov-pozicija-federacii-profsojuzov-kyrgyzstana/>

⁶⁶ Interview with a representative of the Mining and Metallurgical Trade Union of the Kyrgyz Republic

for work on on-location platforms. The pandemic has also led to an increase in the demand for certain types of on-location platform work. For example, the demand for food delivery and grocery delivery has increased, as people have been reluctant to go out in public. The demand for ride-hailing services has also increased, as people have been avoiding public transportation. As the pandemic ended, the new habits of using the Internet, mobile applications and remote services remained. So overall, this market grew substantially during the pandemic, and it has not declined after the pandemic, but continues to grow dynamically.⁶⁷

Attractiveness of on-location platform work

The factors that influence the popularity of on-location platform work are similar to the factors that influence the popularity of online platform work. However, there are some key differences. On-location platform work typically involves physical tasks that require a person's presence at a specific location. The popularity of such work - ride-hailing, beauty services, repair services - depends on the demand for those specific tasks in a particular geographic area. For example, delivery services, handyman work, or event staffing may be more popular in urban areas, such as Osh or Bishkek, with higher population density. The popularity of on-location platform work is influenced by the skills needed to perform the tasks. Certain skills, such as popular in Kyrgyzstan specialised trade skills or manual labour, are more in demand for on-location work. On-location platform work relies on the availability of adequate infrastructure and technology in a particular area. For example, ride-hailing services require a sufficient number of drivers and a reliable transportation network.

The main ways that people find out about job opportunities and start working through the platforms is through friendly (sometimes clan) support for each other, and word of mouth; also, nowadays, networking in social messengers quickly convey information about the profitability of the job, the quality of the employer and other aspects. In some cases, people may be recruited for on-location platform work. This is typically done by businesses that are looking for specific skills or experience. Businesses may recruit people through online job boards, social media, or word-of-mouth such as HeadHunter.kg, Lalafo, Diesel Forum, etc., which are very popular, and it is safe to assume that probably all young Kyrgyz of working age population have some form of mobile app installed on their smartphone.⁶⁸

On-location platform worker profiles

The profiles of on-location platform workers vary widely but the general trends can be highlighted as follows:

- Men are more likely to work on-location platforms than women. However, this varies by platform and sector. One may find more males in ride-hailing and food delivery and more females in beauty industry.⁶⁹
- On-location platform workers tend to be younger than traditional employees. According to the interviews carried out for this report, this is likely because younger workers are more likely to be comfortable with technology and to be looking for flexibility and independence in their work.⁷⁰
- On-location platform workers come from all ethnic and national backgrounds. However, there are some platforms that are more popular with certain groups of workers. For example, in Bishkek, food delivery platforms are more popular with Kyrgyz workers than with workers from Russia.⁷¹

⁶⁷ Interview with a representative of Employment Promotion Department, Ministry of Labour, Social Protection and Migration

⁶⁸ <https://economist.kg/novosti/2023/03/17/tri-luchshih-mobilnyh-prilozheniya-kyrgyzstana/>

⁶⁹ The lack of protection against harassment stands in the way of increasing participation of women in ride-hailing, as shared by interviewees in the study by Solidarity Center (2022). Roadmap to Justice: How Kyrgyzstan's Platform Economy Workers Can Stand for Their Rights. Available [here](#).

⁷⁰ Interview with a HR-manager of a software company.

⁷¹ Interview with a HR-manager of a software company.

- On-location platform workers are motivated by a variety of factors, including flexibility, independence, potential to increase earnings, possibility of supplementary income.⁷²
- On-location platform workers have a wide range of education levels. Many workers have basic education, while others have a college degree.⁷³ The education level of on-location platform workers is likely to vary by platform and by sector.
- The skills in demand for on-location platform workers vary depending on the platform and the type of work. However, some general skills that are in demand include⁷⁴: communication, customer service, time management, technology skills according to the sector and basic ICT skills. It means that on-location platform workers need to be able to use appropriate technology in their sector effectively, and to use computers, mobile devices, and other tools to complete tasks. In addition to these general skills, there are also some specific skills that are in demand for certain types of on-location platform work. For example, drivers need to have a driver's license and be familiar with the area they will be working in. Delivery workers need to be able to lift and carry heavy objects. And customer service representatives need to be able to speak multiple languages as only three out of four citizens are of Kyrgyz nationality.⁷⁵

Working conditions

For the most part, the ride-hailing and delivery platforms are so advanced in terms of organisation and pay that many workers have made it their full-time job, sometimes to their detriment, with heavy overtime, which is a big problem for labour protection in these sectors.⁷⁶ There are also many cases where these types of jobs are part time and people start taxiing in their spare time.

Based on the results of a survey of Yandex Go drivers conducted by the Solidarity Center in 2022, in Kyrgyzstan, the overwhelming majority of respondents earned up to 20.1 USD per shift, while 13% earned more than 20.2 USD. Comparing to the average wage in Kyrgyzstan, earnings of the majority of the surveyed drivers (around 66%) are either at a comparable level or above the average daily rate in the country, which amounts to 10.8 USD.⁷⁷

The other service platforms, which combine all the other possible types of on-location jobs, is also often used as a main job, or as a secondary job, for earning a living.⁷⁸ The vast majority of workers do not belong to trade unions, mainly because employers are reluctant to recognise them as employees. On-location platform work can be a good way to start a career or to supplement income from another job.⁷⁹ However, it is important to note that there is no guarantee of career advancement or long-term job security.

The contractual arrangements and working relations for on-location platform work in Kyrgyzstan are still evolving, and there is no single set of rules that applies to all platforms. However, some common arrangements may be outlined. Independent contractor agreements are the most common type of arrangement for on-location platform work, the worker should be registered as self-employed and have a special form of registration for the self-employed to be a legal taxpayer and to provide a job. Under

⁷² Interview with a Director of an IT company

⁷³ Interview with a Director of an IT company

⁷⁴ Interview with a HR-manager of a software company

⁷⁵ Sputnik Kyrgyzstan. October 2019. How many nationalities live in Kyrgyzstan – infographic, available at <https://ru.sputnik.kg/20191014/infografika-nacionalnost-naselenie-statistika-1045965705.html>

⁷⁶ There is evidence that 47% of taxi drivers working through Yandex Go in Kyrgyzstan work more than 8 hours a day (see [here](#)); Federation of Trade Unions of Kyrgyzstan. (2023). Platform employment and its impact on workers - the position of the Federation of Trade Unions of Kyrgyzstan, available at <https://fpk.kg/novosti/platformennaja-zanjatost-i-ee-vlijanie-na-rabotnikov-pozicija-federacii-profsojuzov-kyrgyzstana/>

⁷⁷ Calculated from the monthly average wage, assuming 20 working days in a month.

⁷⁸ Interview with a representative of the Employment Promotion Department, Ministry of Labour, Social Protection and Migration

⁷⁹ Interview with a Director of an IT company

these types of agreements, the platform is not considered to be an employer, and the worker is responsible for their own taxes, insurance, and other expenses. The country's labour code does not specifically address on-location platform work, so the workers and platforms use general regulations. The enforcement of these regulations is still a challenge. The Ministry of Labour, Social Protection and Migration⁸⁰ has limited resources, and it has been difficult to track down and enforce violations. However, the government is committed to regulating on-location platform work, and it is likely that we will see more regulations and enforcement in the future. As it was concluded in the report of the World Bank⁸¹ about the current state of national regulations in this area: "In the digital economy, the emerging new actors, such as the digital platforms or ecosystems owners, remain invisible for the industry and antimonopoly laws, which fail to hold concentration of significant market power in their hands and, as a result, cannot address the economic inequality. First of all, effective digital governance requires regulation of such new entities' activity on a cross-industry basis."

Informality rates for on-location platform workers are even higher than for traditional employees in Kyrgyzstan and there are a number of reasons for this. Firstly, platform work in Kyrgyzstan is initially in the informal economy, which means that it is not subject to government regulation from the onset. Secondly, platform work is often characterised by short-term contracts, which makes it difficult for workers to qualify for formal employment. Thirdly, platform work is often done on a freelance basis, meaning that workers are responsible for their own taxes, insurance, and other expenses.

Generally, the absence of a clear employment status comes with challenges for on-location platform workers. Yandex Go drivers in Kyrgyzstan interviewed during the Solidarity Center study in 2022 cited the lack of social security contributions, the lack of insurance, and no official employment contract as the main challenges of these work arrangements. Preferable solutions to improve working conditions suggested by the interviewed Yandex Go drivers in Kyrgyzstan included signing employment contracts, providing car and driver insurance, reducing the number of deductions from drivers that the platform makes, and involving both drivers and companies in the formal approval of regulations that guide drivers' work. Other suggestions were introducing pension contributions and a fixed minimum wage.⁸²

In February 2021, the Kabylan taxi drivers' union was established in Bishkek. The establishment of the drivers' representative body was preceded by a series of rallies and actions by Yandex taxi drivers demanding that the company legalise its operations in Kyrgyzstan, start paying taxes and reduce the share of deductions from drivers. Thanks to institutionalisation and the creation of the trade union, taxi drivers are able to defend their rights more effectively and make their voices heard at various venues, the Kyrgyz Parliament, the media, round tables and conferences. Trade union membership is growing. The Taxi Drivers Trade Union is helped the most by the Mining and Metallurgical Trade Union of the Kyrgyz Republic. The Kabylan trade union has established a material assistance fund, a kind of mutual aid fund, where trade union members can receive interest-free loans and assistance.

⁸⁰ Interview with a representative of the Employment Promotion Department, Ministry of Labour, Social Protection and Migration

⁸¹ World Bank. (2022). Project "Digital CASA - Kyrgyz Republic". CS-QCBS-3-1-1. Analysis of Gaps and Conflicts in the Kyrgyz Republic Regulatory Framework with an Overview of the Global and Regional Best Practices (Output 2), available at <https://internetpolicy.kg/wp-content/uploads/2022/06/Gap-analysis.pdf>

⁸² Solidarity Center (2022). Roadmap to Justice: How Kyrgyzstan's Platform Economy Workers Can Stand for Their Rights. Available [here](#).

CURRENT REGULATION, POLICIES AND STRATEGIC APPROACHES

Work on digital labour platforms is becoming progressively relevant in public policy discussions in Kyrgyzstan, as these forms of work raise a number of issues that the government needs to resolve. The adoption of the law on Electronic Commerce⁸³ in 2021 gave a positive impetus to the development of business based on digital platforms. The law regulates social relations between natural and legal persons in the sphere of electronic commerce carried out with the use of ICT, establishes requirements for the execution of electronic transactions for the sale, purchase and exchange of goods and/or works and/or services, including exclusive rights to intellectual property objects. Unfortunately, it does not regulate labour relations.

Kyrgyzstan's government organisations plan to invest in education and training to ensure that its workforce has the digital skills needed for the jobs of the future⁸⁴; the government also plans to support entrepreneurship and promote innovation to create new businesses and jobs by providing a supportive environment for entrepreneurs, access to capital, training, and other resources.⁸⁵ Moreover, Kyrgyzstan attracts foreign investment to create new jobs and businesses by improving the investment climate and providing incentives for foreign investors.⁸⁶

The government of Kyrgyzstan has also developed a number of specific policies and programmes aimed at addressing the challenges of changing labour demand and new business models:

- The Concept of Youth Policy⁸⁷ for 2020-2030, which provides training and employment opportunities for young people.
- The draft National Employment Strategy,⁸⁸ which aims to digitalise the sphere of employment promotion;
- The Concept of Digital Transformation “Digital Kyrgyzstan 2019-2023”⁸⁹.

These policies and programmes were designed to help Kyrgyzstan's workforce adapt to the changing labour market and create new opportunities for economic growth. New forms of work, such as platform work, have not been reflected in the national strategic documents yet. Overall, the impact of new forms of employment on Kyrgyzstan is still being debated, and many people are concerned about the potential negative consequences, such as increased inequality and exploitation. It is likely that the debate over new forms of employment will continue for some time.⁹⁰

⁸³ Law on Electronic Commerce of the Kyrgyz Republic. (2021), available at <http://cbd.minjust.gov.kg/act/view/ru-ru/112333>

⁸⁴ President of the Kyrgyz Republic. (2021), Decree No. 435. National Development Programme of the Kyrgyz Republic until 2026. Bishkek, available at <http://cbd.minjust.gov.kg/act/view/ru-ru/430700>

⁸⁵ Kasymova S.M., Azimov I.N., Zhoroieva A.G. (2021). Main directions and ways to improve employment in the Kyrgyz Republic. Topical Issues of Modern Economics, No. 4. pp. 338-345. Available [here](#).

⁸⁶ Mogilevsky, R. (2020). Labour Market and Technological Development in Central Asia // Report of the Institute of Public Administration and Policy of the University of Central Asia (UCA). No. 58. - P. 1-45, available at <https://ucentralasia.org/media/zrynjxpu/uca-ippa-wp58-labor-market-and-technological-devrus.pdf>

⁸⁷ Government of the Kyrgyz Republic. (2019). Concept of Youth Policy for 2020-2030, available at <http://cbd.minjust.gov.kg/act/view/ru-ru/157204>

⁸⁸ Government of the Kyrgyz Republic (2022), Draft employment promotion programme for 2022 – 2026, available at <https://www.gov.kg/ru/npa/s/3234>

⁸⁹ Government of the Kyrgyz Republic. (2019). Concept of Digital Transformation “Digital Kyrgyzstan 2019-2023”, available at <https://www.gov.kg/en/programs/12>

⁹⁰ Interview with a representative of the Mining and Metallurgical Trade Union of the Kyrgyz Republic

Labour market, employment and skills development

The basis for the regulation of labour relations is the general Labour Code (2004), which sets out the general principles of employment, including the right to a safe and healthy work environment, the right to fair wages, and the right to social protection benefits. People engaged in platform work are largely excluded from these protections.

While no regulation or policy measures related specifically to platform work are being taken, a number of measures exist related to enhancing quality job creation, tackling migration and brain drain, fair working conditions and skills, as well as in preventing segmentation and informality in Kyrgyzstan. This includes the following basic measures:

- Investing in education and training to ensure that the workforce has the skills and knowledge needed to fill the jobs that are available. Investment in education increased by 36% in 2023 compared to the previous year.⁹¹
- Creating a favourable investment climate that attracts domestic and foreign investment and creates new jobs.⁹²
- Enhancing access to credit helping businesses to start up and grow.⁹³
- Promoting entrepreneurship for the creation of new formal businesses and jobs; the development of “white” small and medium-sized enterprises (SMEs) can play a key role in reducing poverty and inequality by providing them with access to finance, training, and markets.⁹⁴
- Protecting workers' rights that articulate rights of migrants, unemployed, NEETs and vulnerable groups to ensure that workers are treated fairly and that they have equal access to social protection benefits. A particular area of focus will be best practices related to enhancing the role of women in the workforce, who are underrepresented. The government should enhance the role of women in the workforce by addressing these barriers and by promoting gender equality.⁹⁵
- Improving infrastructure that makes the business environment easier to operate and attracts investment.⁹⁶

By bringing these and other measures necessary to develop work on the platforms into a coherent set, the Kyrgyz government can create a more favourable environment for the online business and workers and contribute to the country's economic development. However, when we talk about the role and impact of existing labour market institutions (employment protection legislation, wage and minimum wage fixing, employment/unemployment benefits, social dialogue) for workers in online work and the platform work, we see their lesser influence compared to other areas of work. These mechanisms are only partially relevant for online and on-location platform workers, who face great challenges in negotiating fair wages, employment protection, employment and unemployment benefits due to the nature of their work arrangements.

The COVID-19 pandemic has had a significant impact on the labour market in Kyrgyzstan. The pandemic has led to a sharp decline in economic activity, which has resulted in job losses and a decline

⁹¹ Akchabar. September 2022. Kyrgyzstan to increase state investment in education in 2023, available at <https://www.akchabar.kg/ru/news/v-2023-godu-kyrgyzstan-uvlichit-obem-gosinvesticij-v-sferu-obrazovaniya/>

⁹² Ministry of Economy and Commerce of the Kyrgyz Republic. (2020). Investment climate in the Kyrgyz Republic, available at <https://mineconom.gov.kg/ru/post/6759>

⁹³ Ministry of Economy and Commerce of the Kyrgyz Republic. (2020). Investment climate in the Kyrgyz Republic, available at <https://mineconom.gov.kg/ru/post/6759>

⁹⁴ President of the Kyrgyz Republic. (2021), Decree No. 435. National Development Programme of the Kyrgyz Republic until 2026. Bishkek, available at <http://cbd.minjust.gov.kg/act/view/ru-ru/430700>

⁹⁵ President of the Kyrgyz Republic. (2021), Decree No. 435. National Development Programme of the Kyrgyz Republic until 2026. Bishkek, available at <http://cbd.minjust.gov.kg/act/view/ru-ru/430700>

⁹⁶ Savin V.Ye., Taranova Ye.V., Myrzaliyeva M.A. (2022). Development of small and medium-sized businesses in Kyrgyzstan and its role in saturating the consumer market// Regional economy and management: electronic scientific journal. ISSN 1999-2645. — №2 (70). Art. #7001. DOI: 10.24412/1999-2645-2022-270-1

in wages. In response to the pandemic, the government of Kyrgyzstan has implemented a number of labour policy measures. These measures included the introduction of a temporary unemployment benefit scheme, the provision of loans to businesses, the provision of training and support to workers through PES and affiliated institutions. Due to lack of clarity over their contractual status in the national jurisdiction, many vulnerable workers were not included within emergency fiscal packages and other conventional social protection frameworks.⁹⁷ The pandemic has forced the government to accelerate its digitalisation efforts in order to provide essential services to citizens and businesses by increased focus on development of e-government services, such as an online tax filing system and an online passport renewal system. The government has also increased investment in digital infrastructure to support the increased use of digital services. A new national data centre has been built and the country's fibre optic network has been expanded. The pandemic has also led to an increased adoption of digital technologies by businesses and education in Kyrgyzstan who have been forced to adopt digital technologies to continue operating during the pandemic.

Digitalisation

The Kyrgyz government has prioritised the development of the country through a total digital transformation, reflected in the state concept paper Digital Kyrgyzstan 2019-2023,⁹⁸ which lays the foundation for a new digital, smart and developed society. Starting in 2019, the promotion of all digital projects, including infrastructure projects, whose implementation was carried out in accordance with the approved Roadmap,⁹⁹ has become a priority. The aim was to promote digitalisation in all spheres of social relations, including public administration, provision of state and municipal services, education and healthcare, and the economy sector. The main tool for ensuring digital transformation has become the continuous professional development of citizens' digital skills, from digital and network literacy to the acquisition of a higher level of digital competencies.

In January 2022, the Action Plan for the digitalisation of management and development of digital infrastructure in the Kyrgyz Republic for 2022-2023¹⁰⁰ was approved (and replaced by the Digital Roadmap). One of its directions is to develop human capital and train professional staff in the field of ICT that helps create new jobs and improve access to quality education, healthcare and entrepreneurship at all levels of education. Additionally, two laws were approved: the Law on Electronic Commerce¹⁰¹ mentioned above, which regulates the provision of electronic services, including online work platforms, and the Law on Personal Data Protection,¹⁰² which protects the privacy of individuals' personal data, including data collected by online work platforms.

The Kyrgyz government has taken other policy approaches and measures to promote digitalisation and digital skills, such as the development of a national e-government platform, the establishment of the Ministry of Digital Development¹⁰³ in 2021 and the provision of financial assistance to businesses to adopt digital technologies through a number of financial instruments, such as the Digital Economy Development Fund¹⁰⁴ and the E-Commerce Development Fund.¹⁰⁵

⁹⁷ ILO. (2021). Application of key labour law provisions during the COVID-19 pandemic in Belarus, Georgia, Kazakhstan, Kyrgyzstan, and the Russian Federation – ISBN: 9789220352007 (web PDF). Available [here](#).

⁹⁸ Government of the Kyrgyz Republic. (2019). Concept of Digital Transformation "Digital Kyrgyzstan 2019-2023", available at <https://www.gov.kg/en/programs/12>

⁹⁹ Government of the Kyrgyz Republic. (2019). Roadmap for the implementation of the Digital Transformation Concept "Digital Kyrgyzstan 2019-2023", available at <http://cbd.minjust.gov.kg/act/view/ru-ru/216896>

¹⁰⁰ Government of the Kyrgyz Republic. (2022). Action plan on digitalisation of management and development of digital infrastructure in the Kyrgyz Republic for 2022-2023, available [here](#).

¹⁰¹ The Law on Electronic Commerce of the Kyrgyz Republic. (2021), available [here](#).

¹⁰² The Law on Personal Data Protection. (2008), Available at <http://cbd.minjust.gov.kg/act/view/ru-ru/202269>

¹⁰³ Website of the Ministry of Digital Development available at <https://digital.gov.kg/>

¹⁰⁴ Website of the Digital Economy Development Fund available at <https://decdfund.ru/>

¹⁰⁵ Website of the E-Commerce Development Fund available at <https://mineconom.gov.kg/ru/discussion/77>

In addition to the above-mentioned National Development Programme, the Education Development Programme¹⁰⁶ was adopted to clarify the provisions for the development of education for youth, unemployed and vulnerable groups. Directly, this programme does not specify the development of special digital skills but articulates the development of all education through the improvement of the digital environment, digital learning, and remote access to educational resources both from educational institutions and at home, and the development of digital educational materials.

Various programmes sponsored by international donors also support the development of digital skills in Kyrgyzstan. Notable examples include the project “Digital Skills and Youth Employment Opportunities in the Digital Economy in the Kyrgyz Republic” funded by UNDP¹⁰⁷; the project “DigiKonush¹⁰⁸ – Building a transparent future in rural communities of Kyrgyzstan through digitalisation” implemented by the Centre for Civic Initiatives “Leader” in partnership with the Estonian Centre for International Development with the support of the European Union; and the project¹⁰⁹ “Sanarip Insan” (“Digital Citizen”) funded by the European Union and implemented by the European Neighbourhood Council together with the Public Association Internet Society Kyrgyz Chapter.

The digitalisation of Kyrgyzstan's economy provides an impetus for the intelligent involvement of social partners (employers, their associations and trade unions) in providing and contributing to skills needs assessment and forecasting in the country. In particular, such a platform for dialogue is the High Technology Park¹¹⁰ of the Kyrgyz Republic, which is an example of digital business development and export of digital services supported by the state and which puts into practice the Concept of Digital Transformation “Digital Kyrgyzstan 2019-2023” (2019). An innovation cluster has been created in the Park, which also has a regional centre of excellence for digital skills development in partnership with leading national and regional universities, enterprises and associations, as well as an accelerator centre for innovation and start-up development. A significant boost to the development of the Park was the implementation of the project “Digital CASA - Kyrgyz Republic”¹¹¹ providing technical advisory services in the development of regional partnerships for skills, jobs and innovation in the digital economy to enable government leaders, officials, ICT professionals and other citizens, especially women, youth and disadvantaged groups, to acquire skills for the digital economy.¹¹²

¹⁰⁶ Government of the Kyrgyz Republic (2021), Decree No. 200. Programme for the Development of Education in the Kyrgyz Republic for 2021-2040, available at <http://cbd.minjust.gov.kg/act/view/ru-ru/158227>

¹⁰⁷ UNDP (2019). Digital Skills and Youth Employment Opportunities in the Digital Economy in the Kyrgyz Republic, available [here](#).

¹⁰⁸ Project Digital skills trainings for local trainers “DigiKonush”. (2022), available [here](#).

¹⁰⁹ Project “Sanarip Insan – Digital Citizen”. (2022), available at <https://isoc.kg/projects/sanarip-insan-digital-citizen/>

¹¹⁰ Website of High Technology Park of the Kyrgyz Republic, available at <http://htp.kg/>

¹¹¹ World Bank. (2018). Project “Digital CASA - Kyrgyz Republic”. Sub-component 3.2: Regional partnerships for digital economy skills, jobs and innovation in the digital economy, available [here](#).

¹¹² Tashbaev, A.M., Osmonalieva, D.A., Zhakshylyk Kyzy, G. (2022). Development of digital skills in the context of the implementation of digital projects in the Kyrgyz Republic. Economics and business: theory and practice. 1-2 (83). Available [here](#).

POLICY IMPLICATIONS

Kyrgyzstan has seen a number of distinct trends in labour organisation and labour market flexibility in recent years. It is the stable share of the informal economy due to the weak enforcement of labour laws, which leads to an increase of temporary and contract work as employers seek to reduce their labour costs and increase their flexibility, and this gives rise to informal self-employment as people seek to escape the low wages and poor working conditions of the formal sector.

Although the Kyrgyz government has adopted policy approaches and measures to develop and promote digitalisation and digital skills, and has implemented numerous initiatives and programs detailed in the chapter above there is no comprehensive strategy for the digital economy in the country. There is still limited vision for how the digital economy can be used to drive economic growth, create jobs, and improve the lives of citizens. There is also the need for better coordination between government agencies, business and civil society organisations on digital economy issues. The digital economy in Kyrgyzstan is also rather underinvested, there is a limited pool of resources to develop new digital products and services, create jobs, and train workers in digital skills and other 21st-century skills needed for the new economy. Finally, among many enterprises and entrepreneurs, there is a lack of awareness and understanding of the opportunities and prospects of the digital economy.

The new trends in online and on-location platform work in Kyrgyzstan have significant policy implications, especially in terms of skills and human capital development to thrive in the digital economy. Therefore, a number of recommendations are suggested:

- Efforts should be made to provide training programmes, online and offline courses to enhance digital literacy, entrepreneurship, remote collaboration, and other relevant skills such as communication and organisation, and time management skills. Investments in skills development can help individuals access online work opportunities and contribute to the growth of the digital economy.
- Not all segments of the population in Kyrgyzstan have equal access to digital infrastructure and technology. The digital divide may create disparities in accessing digitalised employment opportunities, leaving certain groups marginalised and at a disadvantage. Ensuring widespread access to affordable and reliable Internet connectivity, especially in remote areas, is crucial for individuals to participate in online and on-location platform work. Policies should focus on expanding Internet infrastructure, reducing the digital divide, and providing subsidies or incentives for the acquisition of necessary technology and devices.
- The prevalence of the informal economy in Kyrgyzstan poses challenges in terms of regulation and taxation of new forms of employment, potentially leading to a lack of social protections for workers. The absence or inadequacy of regulations and policies addressing new forms of employment creates uncertainty and hinders the growth of the digital labour market, which, in turn, keeps the trend towards the informality of the economy in the country unless decisive steps are taken towards the creation of regulatory acts.
- The nature of online and platform work often lacks traditional labour protection, such as minimum wage, social protection, and health benefits. Policymakers should explore ways to provide social protection to online workers, including developing mechanisms for income security, healthcare, and retirement benefits.
- By continuing to foster an entrepreneurial ecosystem based on digital technologies, the government can stimulate innovation and job creation in the digital sector and in other sectors where it is beneficial for labour and capital. Entrepreneurship should be encouraged and supported by providing access to capital, business development services, mentoring programmes and networking opportunities.
- As online work involves sharing personal and sensitive information, data privacy and security concerns need to be addressed. Legislations should be developed to protect workers' data, establish data protection mechanisms, and ensure compliance with international privacy standards. Promoting

cybersecurity awareness and investing in cybersecurity infrastructure are also important for the safe and secure operation of online platforms.

- Policymakers should engage in collaborative efforts with industry stakeholders, including platform companies, civil society organisations, educational institutions, and international organisations. This collaboration should create a system for monitoring and collecting data on the new labour market trends to develop responsive policies, and foster a supportive environment for the growth of the platform economy and skills of platform workers in general.

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GLOSSARY

| Term | Definition |
|---------------------------|---|
| Freelancer | A person who is self-employed and not necessarily committed to a particular client long term. The most common fields, professions and industries where freelancing is predominant include music, writing, acting, computer programming, web design, graphic design, translating and illustrating, and film and video production. |
| Informal employment | The International Labour Organisation (ILO) defines informal employment as all forms of remunerated work that is not registered, regulated or protected. These are also referred to as 'shadow' or 'grey' employment arrangements. |
| New forms of work | New forms of work, other than regular employment and traditional self-employment, emerging in the context of the transformation of labour markets and economies. New forms of work are characterised by one or more of the following characteristics: innovative forms of work organisation and contractual arrangements, provision of work on discontinuous or intermittent basis, absence of one on one employment relationship, a place of work that is outside of employer premises, and the use of digital technology that changes patterns of work. Examples of new forms of work include platform work, remote work using information and communication technologies (ICT), voucher-based work, employee sharing, portfolio work and other arrangements. |
| Online labour platform | The term used to distinguish platforms that mediate labour arrangements from other sorts of platforms. For example, Facebook, Google, Amazon, Upwork and Uber are all online platforms, but only the last two of these are online labour platforms. Their main business model is related to mediation between labour service providers and buyers. The term also excludes online websites acting as pure job advertisement boards or curriculum vitae banks and online info-desks, as online labour platforms also intermediate the service and monetary transactions between workers and clients. |
| Online platform | A digital service that facilitates interactions between two or more distinct but interdependent sets of users (whether firms or individuals) who interact through the service via the Internet. |
| Online platform work | Online freelance platform work in which services are provided online and independently of location. It includes both highly-skilled work (e.g. software development and design on platforms like Upwork) and lower-skilled work (e.g. clickwork on platforms like MTurk). |
| On-location platform work | Platform work in which services are provided at a specific location, where a platform worker should be physically present. Includes both highly |

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|-----------------------------------|--|
| | skilled work (e.g. music teaching, consulting, architecture) and lower-skilled work (e.g. taxi services, food delivery, pet care). |
| Online work off digital platforms | Freelancing work that is conducted online and independently of location, but outside of digital platforms. The freelance work is provided directly for clients without online labour platform mediation. |
| Platform economy | Economic and social activity facilitated through online platforms. Like the regular economy, it can be characterised by flow of both capital and labour. |
| Platform labour/ platform work | All labour provided through, on, or mediated by, online labour platforms in a wide range of sectors, where work can be of varied forms, and is provided in exchange for payment. Platform work can be further divided into online and on-location platform work. |
| Self-employment | A broad set of labour practices wherein a natural person earns income without an employment relationship with an employer; both bogus self-employment and genuine self-employment are types of self-employment. Self-employment can be registered with authorities in a variety of forms in different countries (e.g. sole proprietor, individual/private entrepreneur, service/work contracts for independent contractors). |

LIST OF INTERVIEWEES

| Role/Organisation | Date of the interview |
|--|-----------------------|
| Interviews | |
| Deputy Director, High Technology Park | June 08, 2023 |
| Director, CRM Technologies | June 09, 2023 |
| Head of the Department of Labour Statistics and Employment, National Statistical Committee of the Kyrgyz Republic | June 08-09, 2023 |
| Senior Specialist, Department of Labour Statistics and Employment, National Statistical Committee of the Kyrgyz Republic | June 08-09, 2023 |
| Head of Employment Promotion Department, Ministry of Labour, Social Protection and Migration | June 09, 2023 |
| Chairman, Central Committee, Mining and Metallurgical Trade Union of the Kyrgyz Republic | June 12, 2023 |
| HR-manager, Namba Soft – Namba Group | June 19, 2023 |
| Director of international relations, KSSDA - Kyrgyz Software and Service Developers Association | June 22, 2023 |
| Food delivery courier, Glovo | June 22, 2023 |