

Structure and trends of platform work in the Republic of Croatia in 2025: an empirical analysis based on JEER system data*

Abstract

This article analyses the state and trends of platform work in the Republic of Croatia during 2025, with a particular focus on the first full calendar year of the Unified Electronic Labour Record (JEER) system application. By implementing amendments to the Labour Act, Croatia established an advanced regulatory model that preceded EU Directive 2024/2831 on improving working conditions in platform work, positioning itself as a leader in the digital transformation of the labour market. The empirical analysis is based on official data from the Ministry of Labour, Pension System, Family and Social Policy, encompassing quantitative indicators on 21,704 workers, four key digital platforms and the operations of 2,336 market intermediaries (aggregators). The central subject of the research is the effectiveness of the JEER system in ensuring transparency and real-time data monitoring, and in combating undeclared work. The results highlight the significant role of technological solutions in protecting workers' rights and stabilising relations within the tripartite (platform-aggregator-worker) platform work model.

Keywords: platform work, JEER, Labour Act, digital labour platforms, aggregators, Republic of Croatia

Introduction

The rapid development of digital technologies and the shift in the work paradigm have led to a strong rise in the platform economy globally, including in the Republic of Croatia. Work through digital labour platforms introduces significant changes to traditional labour relations, requiring national legislations to develop new mechanisms for control and the protection of market participants. In this context, Croatia positioned itself as one of the first European Union member states to draw up a systematic regulation in this field – even before the final adoption of Directive (EU) 2024/2831 on improving working conditions in platform work – through amendments to the Labour Act.

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During 2025, the labour market in Croatia entered full operational maturity in the digital labour platform segment, as this was the first complete cycle in which the new regulatory framework was applied in its full scope.

Legal framework and technological infrastructure

The Unified Electronic Labour Record system (known here by its Croatian acronym, JEER: jedinstvena elektronička evidencija rada) represents a key pillar of legal certainty and transparency within this system. Its functioning is based on synergy between several key regulations:

- Act on amendments to the Labour Act (*Official Gazette* 151/22)
- Act on the suppression of undeclared work (*Official Gazette* 151/22)
- Ordinance on labour records via digital labour platforms (*Official Gazette* 150/23)
- Ordinance on the unified electronic labour records system (*Official Gazette* 8/24)
- Ordinance on the method and deadlines for verifying the amount of receipts realised through work via digital labour platforms (*Official Gazette* 150/23)
- Decree on the minimum wage for 2024 (*Official Gazette* 125/23)
- Decree on the minimum wage for 2025 (*Official Gazette* 124/24).

Through the integration of the e-Citizens, NIAS (national identification and authentication system) and the e-Authorisations systems, the registration and reporting process has become fully digitised, reducing administrative burdens to a minimum while ensuring maximum data accuracy.

A key functional element is the integration with the e-Authorizations system, which works in tandem with NIAS to manage access rights and user roles. This synergy allows legal entities such as digital labour platforms and their aggregators to grant specific digital mandates to their employees or authorised representatives. Through this granular role-based access control, the system ensures that only authorised persons can submit reports or access sensitive labour data, thereby maintaining strict data protection standards and administrative accountability.

Objectives and methodology

This article provides a systematic analysis of the data collected through the JEER system during 2025, with the objective of providing in-depth insight into:

- market structure: the relationship between digital platforms and the 2,336 registered intermediaries
- worker status: an analysis of the employment status of the 21,704 individuals working via platforms
- nature of work: an examination of the thesis that platform work, as an atypical form of employment, is gradually shifting the traditional paradigms of labour relations.

Through analysis of quantitative data and qualitative trends, the article examines how Croatia has adapted to the phenomenon of the ‘platformisation’ of work, ensuring that the flexibility offered by technology does not compromise social security

and the legal protection of the participants in this segment of the labour market. An additional goal is to analyse the state of the platform labour market during 2025, with a specific focus on the results of the first full year of implementing the new comprehensive regulatory framework.

The methodology is based on a multidimensional analysis of structured data extracted from the JEER database. Data processing includes the following key aspects:

- quantitative data extraction: the systematic collection of encrypted records regarding the number of active digital labour platforms, registered aggregators and the total number of platform workers
- time-series analysis: a comparative review of data on a monthly and quarterly basis throughout 2025 to identify seasonal trends and market growth dynamics
- cross-referencing and validation: the process of validating JEER data through automated cross-referencing with the Tax Administration and the Croatian Pension Insurance Institute (HZMO) to ensure the accuracy of reported earnings and contributions
- qualitative assessment: an evaluation of the impact of the regulatory framework on administrative efficiency and the reduction in the 'shadow economy' (undeclared work) within the platform segment.

The processing of this data is carried out in strict accordance with the General Data Protection Regulation (GDPR), ensuring that all analysed metrics are presented in an aggregated and anonymised format to protect the privacy of individual participants.

Register of digital labour platforms and market intermediaries

Stakeholder registration and market structure

One of the fundamental prerequisites for lawful operation in the Croatian labour market is mandatory entry into the Register of Digital Labour Platforms and Market Intermediaries. According to the provisions of the Labour Act, digital labour platforms and their aggregators – the latter acting as the employer in a situation in which the employee chooses not to establish a sole proprietorship company form (essentially as self-employed) – are required to register their activities, ensuring full transparency within the employment chain.

As of 31 December 2025, the Register recorded four digital labour platforms, which have registered a total of 2,336 aggregators for their business operations. An analysis of the structure of these intermediaries indicates a dominance of legal entities, with 1,457 (these will be limited liability companies), while the remaining 879 consist of sole proprietors. These data, presented in tables 1 and 2, confirm a high level of market organisation and the successful integration of a large number of business entities into the digital ecosystem via JEER.

Table 1 – Structure of stakeholders in platform work (end-2025)

	No. of entities
Digital labour platforms	4
Intermediaries (aggregators)	2,336

Source: Ministry of Labour, Pension System, Family and Social Policy (2026)

Table 2 – Breakdown of market intermediaries (end-2025)

	No. of entities
Legal entities (companies)	1,457
Sole proprietors (self-employed)	879
Total	2,336

Source: Ministry of Labour, Pension System, Family and Social Policy (2026)

Although the quantitative data suggest an exceptionally high concentration of intermediaries, qualitative analysis indicates a predominance in the figures of micro-entities: a significant portion exclusively employs own family members for occasional or temporary work, suggesting that platform work in Croatia often serves as an additional source of household income rather than being necessarily the primary activity of large enterprises.

This trend highlights two essential aspects: market flexibility and the fragmentation of digital labour platforms in Croatia. Specifically, flexibility is evidenced by JEER data, which successfully encompasses even the smallest intermediaries, ensuring that even occasional family-based work remains within the prescribed legal framework. Regarding fragmentation, this primarily refers to the high number of intermediaries and is not necessarily an indicator of market power. Instead, it reflects atypical forms of work in which individuals utilise the legal form of sole proprietorship or a company to formalise platform-based work within the family unit.

Labour market shifts over recent decades have significantly shaped the structure of employment in Europe and Croatia (Florczak 2020; Grgurev and Vukorepa 2018). The standard employment relationship – characterised by contracts of indefinite duration and based on full-time hours – which social policy has long viewed as the ‘norm’ and the foundation of social rights, is gradually losing its dominance to various forms of non-standard employment. These forms, grouped in the literature under terms such as atypical or non-standard work, or new forms of employment, encompass fixed-term employment, part-time work, occasional and temporary jobs, agency work and self-employment, as well as more recent phenomena like digital and platform work.

Building upon these theoretical foundations, the Croatian platform labour market in 2025 clearly reflects the rise of self-employment as a key atypical form of work. JEER data indicate that a significant portion of the 21,704 platform workers is

operating through their own sole proprietorship companies, effectively acting as both aggregator and worker.

This trend aligns with academic observations, with the traditional employer-employee boundary becoming increasingly blurred (Grgurev and Vukorepa 2018). In the Croatian context, the Act on the suppression of undeclared work specifically addresses these ‘grey zones’ by ensuring that self-employed platform workers maintain a high level of social security coverage and transparent income reporting, thus mitigating the risks often associated with precarious atypical employment.

The Tax Administration, in coordination with the JEER system, ensures a differentiated yet transparent tax treatment for platform work, depending on the legal nature of the engagement:

- employment income: for workers under an employment contract, tax treatment follows standard payroll procedures. This includes the mandatory withholding of personal income tax, local surcharges (where applicable) and full social security contributions (to pension and health insurance), providing the highest level of social protection
- other income: that is, work performed via a service contract. While this model offers lower administrative costs for the market intermediary, it is subject to specific mandatory contributions for pension and health insurance, albeit at different rates than standard employment
- tax compliance and automation: a key feature of the 2025 regulatory framework is the automated verification of payments. The Ordinance on the method and deadlines for verifying receipts allows for real-time cross-referencing between the JEER records and the JOPPD forms – which notify the payments of taxes and social insurance contributions – submitted to the Tax Administration.

This integrated approach prevents tax evasion and ensures that gig economy participants contribute to the national social security system, regardless of whether their work is considered a primary or secondary source of income.

Extract from the 2025 report on platform work in Croatia

Data on work scope indicators

Digital labour platforms are mandated to submit data on every individual task performed, and no later than 24 hours after its completion. The JEER system electronically exchanges integrated data with the Croatian Pension Insurance Institute, the Ministry of the Interior, the Ministry of Finance and, as necessary, with other bodies exercising public authority. Furthermore, the JEER system retrieves data from the central register for the Personal Identification Number (OIB), as well as from the Register of Crafts.

Data on work scope indicators include:

- number of workers carrying out work via digital labour platforms
- type of contractual relationships under which workers are engaged
- nature and type of tasks performed
- average working time and locations where tasks are carried out.

Types of tasks

Work scope data for 2025 clearly show that platform work in Croatia remains strictly polarised between two key activities: ride-hailing (taxi services) and delivery. Although both sectors have become an integral part of urban mobility, ride-hailing has positioned itself as the primary activity within the JEER system, accounting for a 65% share.

This disparity (delivery takes the other 35%) can be interpreted through several factors: market regulation; demand and price sensitivity; and seasonal oscillations combined with weather conditions. Notably, ride-hailing has a longer tradition of adapting to digital platforms and a more clearly level of defined demand throughout the year.

The higher share of trips compared to deliveries is likely to be driven by the tourist season and the needs of the local population in urban centres, suggesting high demand and price sensitivity. While delivery is often subject to seasonal fluctuations and weather conditions, ride-hailing shows greater stability in the number of tasks carried out on an annual basis.

Such data suggests that the JEER system enables a precise mapping of market trends, indicating that platform work in Croatia, despite its theoretical breadth, in practice remains predominantly reliant on transportation services.

Structure and number of persons performing work via digital labour platforms

The figure of over 21,000 individuals who worked for a platform during at least one period in 2025 indicates a significant presence of this form of work in the Croatian labour market. Of particular importance is the heterogeneity of the legal grounds for work, which includes:

- standard employment relationships (employment contracts with a platform or an aggregator)
- self-employment (sole proprietors)
- flexible forms of work (service contracts, student work, etc.).

This diversity responds to the ability of the legal framework successfully to absorb all categories of workers, from those for whom this is the primary source of income to those who use platforms for supplementary earnings. Although the total number suggests a degree of mass participation, it also reflects dynamism within the market and a high level of labour force turnover. The JEER system enables the tracking of individuals even during short periods of engagement, previously regarded as a grey area.

In combination with the high number of aggregators, this affirms that platform work in Croatia has become a key testing ground for atypical forms of employment, providing work opportunities to a wide spectrum of citizens – from students to solo entrepreneurs.

Demographic structure and citizenship

An analysis of citizenship data reveals that Croatian citizens form the backbone of platform work (78%). However, a significant share of 4,727 foreign nationals

(22%) reports to the growing trend of foreign labour in shortage occupations such as delivery and transport. The largest number of foreign workers come from India and from Nepal, mirroring broader employment trends in Croatia. Workers from neighbouring countries (Bosnia and Herzegovina, Serbia) remain present but in smaller proportions compared to labour from distant countries.

It is important to note that platform work serves as an initial entry point into the Croatian labour market for many foreign nationals. This presents regulators with the challenge of ensuring equal working conditions and the protection of rights in accordance with the Labour Act.

Such figures highlight Croatia's transformation from a country with a homogeneous workforce into a nation whose digital economy is heavily reliant on global labour mobility. This further justifies the need for the use of digital tools to conduct systematic monitoring.

Gender and age structure

JEER data indicate a pronounced gender imbalance and a specific age distribution among workers. The dominance of men, who account for as much as 94% of the total workforce (20,371 compared to 1,279 women), suggests that the taxi transport and delivery sectors are still perceived as traditionally male occupations, despite the digital nature of the platforms.

When examining the age structure, it is evident that the largest number of platform workers falls within the 25-34 age group. These are individuals in their prime working years who prefer flexibility and digital work models, or are using platform work as a stepping stone at the start of their careers. The relatively small number in the 15-19 age group is likely to be a result of legal restrictions and driving licence requirements. Conversely, the minimal number of workers over the age of 70 highlights the physical demands of these roles.

This age distribution responds to platform work attracting the most technologically proficient and adaptable generations, while simultaneously requiring both basic and advanced digital skills.

Contractual relationships

In 2025, work through digital labour platforms was performed by employees, sole proprietors and self-employed individuals within limited liability companies (e.g. a company director who is also the sole employee) operating under business cooperation agreements or other civil law contracts. Such work was also carried out by individuals under service contracts (work assignments), high school students under occasional work contracts and university students under student employment contracts.

This highlights the complexity of legal relationships within platform work, crystallising the clear division of roles between digital labour platforms and aggregators, as shown in Table 3 (employees registered with HZMO under standard employment contracts and those under zero-hour employment contracts).

Table 3 – Overview of ‘classic’ employment contracts and zero-hour contracts

Category	No. employees	No. contractual relationships	Ratio (contracts per worker)
Classic employment contract (total)	15,094	31,948	2.12
Fixed-term	10,890	24,916	2.29
Indefinite (open-ended)	7,835	15,844	2.02
Full-time	5,348	6,399	1.20
Part-time	12,296	34,361	2.79
Additional work (subset of classic)	3,807	8,812	2.31
Zero-hour contract	1,191	1,977	1.66
Fixed-term (zero-hour)	362	388	1.07
Indefinite (zero-hour)	840	1,589	1.89
Full-time (zero-hour)	347	391	1.13
Part-time (zero-hour)	853	1,586	1.86

Source: Ministry of Labour, Pension System, Family and Social Policy (2026)

Analysis of contractual relationships

From Table 3, it is evident that the Croatian platform labour market is dominated by part-time work, additional employment and contractual fragmentation.

The most striking evidence of the extreme contractual fragmentation is that the number of contractual relationships is twice the number of individual workers. In the category of ‘classic’ contracts, the average employee holds 2.12 contracts. This reflects the practice of multi-apping, where employees work for multiple aggregators simultaneously to secure a sufficient workload.

Part-time work is the most fragmented – 12,296 employees accounting for as many as 34,361 contracts (a ratio of 2.79). This means the average part-time worker enters into nearly three different contracts. This suggests that platform work is serving as a ‘mosaic’ of micro-engagements that only in conjunction constitute a significant amount of work.

The 3,807 employees who are engaged in additional work account for 8,812 contracts, highlighting that platform work plays a major role for individuals already employed elsewhere but who are seeking supplementary income. Flexibility is most prominent in this group, as evidenced by an average of over two additional contracts per person.

Interestingly, regarding zero-hour employment contracts, a higher number of contracts are concluded for an indefinite period (840) compared to ones that are for a fixed term (362). This indicates that aggregators are aiming to maintain a pool

of verified employees who are activated only when market demand rises, while nevertheless providing them with a legal framework that is somewhat more regular.

Comparative overview of platform work data for 2024 and 2025

Comparative data for 2024 and 2025, as presented in Table 4, clearly outline the evolution and stabilisation of the platform labour market in Croatia, highlighting several key trends:

- strong expansion of standard employment relationships
- strengthening of direct cooperation between sole proprietors and platforms
- marginalisation of service contracts (work assignments) and high school student labour
- shift in strategy by the platforms themselves
- growth in university student employment

Table 4 – Types of contractual relationships (2024-25)

Type of contractual relationship	2024	2025	Change (%)	Trend
Employment contract concluded with an aggregator	19,593	26,913	+37.36%	Strong growth
Self-employed sole proprietor with a platform	2,988	4,443	+48.69%	Significant growth
Self-employed sole proprietor with an aggregator	1,186	193	-83.73%	Sharp decline
Student employment contract with an aggregator	634	890	+40.38%	Growth
Service contract (work assignment) with an aggregator	495	336	-32.12%	Decline
Self-employed person in a limited company with an aggregator	133	148	+11.28%	Moderate growth
Self-employed person in a limited company with a platform	115	174	+51.30%	Significant growth
Occasional work contract for high school students with an aggregator	36	8	-77.78%	Phase-out
Employment contract concluded with a platform	26	227	+773.08%	Explosive growth
Student employment contract with a platform	4	1	-75.00%	Minimal presence

Source: Ministry of Labour, Pension System, Family and Social Policy (2026)

The strong expansion of standard employment relationships is reflected in the significant increase in employment contracts concluded with aggregators, which jumped from 19,593 in 2024 to 26,913 in 2025. This increase of nearly 37%

indicates that aggregators remain key 'labour pools' and that the market is rapidly formalising through classic employment relationships.

There is a notable growth trend among self-employed sole proprietors operating directly with platforms (increasing from 2,988 to 4,443). Simultaneously, the number of those working through aggregators has drastically declined (from 1,186 to a mere 193). This suggests that more experienced workers and the independent self-employed are increasingly choose to bypass the aggregators, preferring direct cooperation with platforms to enhance their earnings and autonomy.

A decline is thus visible in the number of service contracts entered into with aggregators (from 495 to 336), while this form of work in platforms entirely disappeared in 2025.

Occasional work by high school students dropped from 36 to a symbolic eight contracts, whereas the engagement of students through aggregators grew by approximately 40% (from 634 to 890). This confirms that platform work remains highly attractive to the younger population due to the flexibility it offers during their period of studying.

Regulatory framework and EU harmonisation

Although Croatia has led the way within the European Union by systematically regulating platform work via the Act on amendments to the Labour Act (*Official Gazette* No. 151/22) and its implementing regulations, a need for additional regulation has now emerged, arising from the requirement for further alignment with Directive (EU) 2024/28311 on improving working conditions in platform work.

Specifically, according to its 2026 legislative activity plan, the Croatian government is planning further amendments to achieve full harmonisation with the Platform Work Directive, serving as the final phase of integrating European standards in this area into the domestic labour market.

Conclusion

This analysis of the digital platforms labour market in Croatia during 2025 confirms the efficiency of the established comprehensive regulatory framework. By systematically regulating this field through the Labour Act and its implementing regulations, Croatia successfully addressed the challenges of platform work even before the full implementation of the Platform Work Directive, positioning itself as a leader in protecting workers' rights in the digital environment.

The central contribution of this system is reflected in the operation of the Unified Electronic Labour Record (JEER) information system, which has enabled the collection of precise, real-time data, thereby achieving a high level of transparency and supervision over work processes. Statistical indicators for 2025, recording 21,704 workers and 2,336 aggregators, indicate a stabilisation of the market while maintaining a specific structure dominated by the presence of legal entities over that of sole proprietors.

The data for 2025 reveal the complexity and dynamism of legal relationships within platform work. The most common forms are employment contracts with

aggregators – most frequently on a fixed-term and part-time basis – while sole proprietorships, student labour and zero hours work are also present.

The majority of individuals working via digital labour platforms are male Croatian citizens within the 25-34 age group. Among foreign nationals, citizens of India and Nepal are the most prominent.

The average work engagement amounts to approximately 22 hours per week (four hours per day), indicating that platform work is primarily being utilised as a supplementary or partial source of income.

During 2025, the digital platform segment of the labour market in Croatia entered full operational maturity following the implementation of the key provisions of the Labour Act, representing the first complete cycle in which the new legal framework was applied in its full capacity.

Nevertheless, that framework remains dynamic as the government is planning further amendments to achieve full harmonisation with the Platform Work Directive. Although Croatia has already implemented advanced mechanisms such as the registry and the JEER system, the upcoming alignment is focused on further improving working conditions and providing a more precise definition of specific forms of platform work.

In conclusion, the results to date demonstrate that the level of digital supervision that has been established is providing a solid foundation for the implementation of the new EU standards, thereby ensuring legal certainty and the sustainable development of the platform economy in Croatia.

Note:

Data availability statement: aggregated JEER data were used. Access to disaggregated records is subject to legal restrictions and GDPR.

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