ENTEEF
Fostering Entrepreneurship through Freelancing

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Freelancer Competences

Version 3.0

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The quantitative analysis of the national datasets within the ENTEEF project was carried out by Florin Stoica (Lucian Blaga University of Sibiu), following a standardized methodological framework. This centralized approach ensured consistency, comparability, and methodological rigor across all participating countries.

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Introduction

The rapid expansion of freelance work represents one of the most significant transformations in contemporary labour markets, driven by digitalization, globalization, and evolving organizational models (Anwar et al., 2023; Kässi & Lehdonvirta, 2018). Increasingly, firms rely on flexible, project-based work arrangements, while individuals pursue freelancing as a pathway to autonomy, income diversification, and participation in global labour markets. Within this context, understanding the competencies required for successful freelancing has become essential for policymakers, educators, and labour market stakeholders.

The report addresses this need by examining freelancer competences across six diverse national contexts: Indonesia, Poland, Romania, Serbia, Spain, and Ukraine. It is based on qualitative and quantitative research conducted in the realm of Erasmus+ ENTEEF project: Fostering Entrepreneurship through Freelancing. The research was conducted in six countries – ENTEEF project partners: Indonesia, Poland, Romania, Serbia, Spain, and Ukraine. The main purpose of the research was to identify the most needed competences for freelancers. By adopting a comparative perspective, the project aims to identify both shared patterns and country-specific differences in freelancer profiles, skill development pathways, and labour market engagement. The report contains the comprehensive analysis of competences needed to pursue a freelancer career. The results of the research comprise the basis for development of Competence Assessment Tool (CAT) and set of MOOCs directed to people who would like to enter freelancer market or already function on this market but see the need for enhancement of their competences (Work Package 4 in ENTEEF project).

The first chapter summarizes the results of interviews conducted among freelancers and company representatives that hire freelancers. The results of this qualitative research provided the basis for the survey development that comprise the quantitative stage of the research described in the next chapter.

The second chapter presents the results of comprehensive survey conducted among freelancers and company representatives, focused on comparison of results among countries. It is based on a large-scale empirical analysis focusing on freelancer characteristics, competencies, and training needs. It begins with a descriptive profiling of freelancers, which provides a necessary analytical baseline, as differences in workforce composition may significantly influence observed competence levels and skill gaps. Subsequently, the chapter presents the results of investigation of the importance and self-assessed proficiency of key competencies required in freelance work, with particular attention to communication, teamwork, and digital literacy. The analysis further explores how freelancers acquire and develop these skills, highlighting the growing importance of informal and practice-based learning pathways. Finally, the findings are integrated into a framework for harmonized training, offering evidence-based recommendations for education providers, policymakers, and platform stakeholders. The chapter concludes with the guidelines for MOOCs development.

Conclusions provide the final remarks. Overall, this study positions freelancers not as a homogeneous group, but as a diverse and adaptive workforce operating at the intersection of technological change, economic restructuring, and individual career strategies. The insights generated provide a foundation for strengthening freelancer ecosystems and supporting the future of work in a digital economy. By linking empirical results with practical implications, the report contributes to the development of targeted interventions aimed at enhancing freelancer competitiveness, sustainability, and adaptability in rapidly evolving labour markets.

1 Semi-structured Interviews among Freelancers and Companies Representatives

1.1 Objectives and research questions

The study employs an interpretivist lens and a qualitative approach, drawing on in-depth semi-structured interviews conducted with two central stakeholder groups: companies that engage freelancers and the freelancers themselves. Although previous research on freelancers' competencies has largely concentrated on self-assessed skills or on broad descriptions of required abilities in digital labour markets (e.g., Gandini, 2016; Lehdonvirta, 2018), comparatively little work has examined freelancers' stated strengths alongside the priorities expressed by employers. By investigating both the capabilities freelancers report offering and those that firms actively seek, this study provides a more nuanced picture of where these expectations intersect or diverge in practice. This perspective not only fills a notable gap in the literature on skill alignment within the freelance sector but also offers valuable insights into attitudes toward freelance work and lived experiences across several Asia-Pacific and European countries, ultimately contributing to a more comprehensive and contextually grounded understanding of freelance competencies.

More specifically, the analysis of the interview data was guided by an interpretivist paradigm, which posits that social reality emerges from the meaning individuals attribute to their experiences (Schutz, 1962). This paradigm highlights the subjective interpretations people assign to their social environments and is therefore well suited to examining complex dynamics such as underlying motivations, perceived barriers, and contextual influences shaping freelancers' interactions with digital labour platforms. Within this framework, in-depth interviews allow for the flexibility and

detail needed for participants to articulate their perspectives in their own words while still maintaining thematic consistency across interviews (Kvale, 2007). This method thus enables the identification of the meaning participants attach to their experiences (Kvale, 2007; Patton, 2015).

The main aim of the study was to explore and interpret the extent to which freelancers' perceived competences correspond with — or differ from — the competences employers value when hiring, in order to generate a richer and more context-sensitive understanding of the competence gap within the freelance economy. This objective leads to the following research questions (RQs):

RQ1: *What core competencies (skills, knowledge, attitudes, and experience) do freelancers claim to possess and companies require, and do these vary according to the individual's or the firm's level of experience in the sector?*

RQ2: *How do freelancers and hiring companies perceive skill gaps and competency mismatches in the freelance economy?*

RQ3: *How do freelancers and hiring companies perceive skill gaps and competence mismatches?*

RQ4: *What challenges will freelancers face in the future, from the perspective of both the freelancer and the contracting company?*

RQ5: *What is the impact of AI on the sector from the perspective of both the freelancer and the contracting company?*

By addressing these two interconnected dimensions, the study aims to enhance awareness of freelance skill dynamics among employers, professionals, and policymakers (Gandini, 2016; Kitching & Smallbone, 2012). The chapter proceeds as follows. First, we outline the qualitative methodology, including the sampling strategy and design of the semi-structured interviews. Subsequently, we present the main findings by comparing (i) the competencies most frequently highlighted by freelancers, such as those they consider central to their profession, essential across projects, or in need of improvement, with (ii) the competencies companies prioritize when selecting independent professionals, including those they perceive as commonly lacking. These skill sets are then positioned on a 2D graph according to the experience levels of both

freelancers and companies within each sector. Finally, we discuss the theoretical and practical implications of the findings, offering guidance for freelancers aiming to align their capabilities with market expectations and for organizations seeking to optimize their use of freelance talent.

1.2 Methodology

1.2.1 Participant selection and characteristics

The goal of Study 1 was to conduct semi-structured interviews with three freelancers from each country, preferably from different domains: (a) technical and information technology (IT) services; (b) content creation, translation, and creative work; and (c) business, marketing, and consultancy. Each country had to interview people in at least two different sectors. In Study 2, one company representative per country was selected, based on the following criteria: (a) working for companies that hire local freelancers; (b) holding a relevant position in the company (Human Resources personnel, team leaders, or Executive board members); and (c) representation across diverse industries and sectors (as per Study 1). Therefore, the total interviewee sample comprised 18 freelancers (Study 1) and six company representatives (Study 2) across the six countries participating in the project.

To ensure the effective recruitment of participants for both qualitative interviews and future surveys, a multi-method or multi-channel approach was employed. This included using local freelancing web portals, university student and alumni networks, MBA and professional training programs, freelancer associations, or social media platforms, among others. The application of a multi-method recruitment strategy is particularly suitable when the target population is highly specific, geographically dispersed, and/or difficult to access (Teddlie & Tashakkori, 2009).

Following the interviews, some of the thematic results were then cross-referenced with participant classification variables, namely ‘country’, ‘age’ (with two categories: “under 35” years old and “35 years and over”), and ‘experience as a freelancer’ (“fewer than 10” years or “10 or more”). In both studies, the classification matrices for cross-

analysis and the grouping and processing of responses were developed using NVivo v13 software, and the positioning analysis was performed in Statistic v13.

Table 1 shows the intersection of the classification variables: interviewee age and number of years' experience as freelancers (see Appendix 5 for details). All the freelancers in our study had clients with an international, regional, and local presence. In some derived matrices, colour coding was applied to visually highlight the most positive or highest frequent–responses, in **green**, and the most negative or lowest frequent, in **red** or **orange**.

Age / Experience	Less than 10	10 or more	Total
Less than 35	9 participants	1 participant	10
More than 35	1 participant	7 participants	8
Total	10 participants	8 participants	18

Table 1. Distribution of freelancer sample by age and experience.

In the case of companies hiring freelancers, Table 2 shows the intersection of the classification variables in this sample: size ("small and medium enterprise"/SME or "large enterprise"/LE), and number of years of experience in the sector ("fewer than 15 years" or "15 years or more") (see Appendix 4 for details). The details are in Appendix 6. As expected, there is a strong association between the two variables.

Size	Years' sector experience: < 15	Years' sector experience: ≥ 15	Total
SME	2 participants	2 participants	4
LE	1 participant	1 participant	2
Total	3 participants	3 participants	6

Table 2. Distribution of company-representatives sample by company size and experience.

1.2.2 Data-collection method

The study began with the freelancer interviews, which lasted between 20 and 40 minutes. Participation was entirely voluntary, and individuals could withdraw at any time without consequences. All the data collected were processed and reported in aggregate form, ensuring complete confidentiality and anonymity of participants. In accordance with the General Data Protection Regulation (GDPR), participants were provided with an Informed Consent form to review online prior to the interview, which clarified their rights and the use of their personal data. These measures protect the privacy of participants and maintain the highest standards of research integrity.

At the end of each interview, participants were asked about their current clients to facilitate subsequent recruitment of companies that hire freelancers.

The interviews followed a semi-structured guide (see Appendix 1, 2), designed to elicit open-ended responses to key themes such as the demand for freelance work, the competencies they perceived as essential, those they perceived themselves to lack, and the risks associated with freelance employment. This method allows for both consistency across interviews and flexibility to explore emerging themes (Longhurst, 2003; Kallio, Pietilä, Johnson, & Kangasniemi, 2016).

Demographic data-collection was tailored to the respondent group: (a) for freelancers, variables such as experience, type of services offered, and client industry were gathered; and (b) for companies in the second study, other classification data such as country, industry, position, and company size were recorded. This qualitative design is particularly valuable when seeking to understand underexplored phenomena

and to generate grounded insights that can support the development of structured survey tools in later research phases (Morse, 1991), as in our case.

Video interviews were carried out using online conferencing tools such as Google Meet or Zoom, and participants were asked for their consent to record the sessions for transcription purposes. To encourage participation, company representatives and freelancers received university-branded items (such as USB drives or T-shirts) or digital incentives such as gift cards, vouchers, or subscription codes for popular online platforms (e.g., YouTube or Spotify).

1.2.3 Measurement instrument

The interview questions (see Appendix 1, 2) were intended to capture the competencies and risks associated with freelance work, and their design drew on a corpus of academic literature addressing the evolving characteristics of digital labour markets and the nature of platform-based employment. These themes are essential to understanding both the expectations of companies and the experiences of freelancers in a rapidly changing work environment.

The set of questions directed at uncovering the most highly valued competencies and those most lacking among freelancers was grounded in research that emphasizes the transformation of knowledge work and the rise of a reputation-based economy. According to Gandini (2016), freelancers operating in digital contexts must constantly adapt their skillsets to remain visible and competitive, often relying on reputation systems and platform feedback. Similarly, Lehdonvirta (2018) highlights the importance of time management, adaptability, and client communication as critical competencies in the gig economy.

From the company perspective, identifying skill gaps helps reveal mismatches between market demand and freelancer readiness. Kitching and Smallbone (2012) argue that freelancers, particularly in knowledge-intensive sectors, are increasingly expected to demonstrate not only technical expertise but also self-management, the ability to manage the customer relationship effectively from start to finish, and project delivery skills. These expectations justify our questions regarding essential

competencies versus those that are lacking, as well as our inquiry into whether certain skills are perceived as universally necessary across freelance roles.

1.3 Results and analysis: Companies

1.3.1 Regular hiring of freelancers and in which areas

Companies take different approaches when it comes to hiring freelancers, depending on their size, workload, and the kind of freelancer expertise they need. Some rely on freelancers regularly, while others only hire them occasionally for specific tasks.

[ES-AM-IA], for example, hires freelancers often, mainly for web design, programming, and photo/video work. They have worked with the same web designer for big projects over the past three years but outsource smaller jobs to others. For them, hiring someone full-time for these roles just does not make sense given the workload.

[IDN- PT-JCS] also hires freelancers regularly, though the number changes year to year, 2023 being their busiest. They usually look for technical writers and programmers, often turning to former employees who already know how things work.

[RS-AB-AMATG] explained they hire freelancers regularly when their internal team lacks certain skills. In those cases, it is simply more practical to outsource than to train someone in-house for a highly specific task.

[PL-ND-MQ] works with freelancers frequently too, especially in development, but also for design tasks and training workshops. Sometimes they just need someone to clarify or “raise” something for a project, and once that is done, the collaboration ends.

Finally, others hire them less often. [RO-CT-SCA; every 2–3 years] and [UA-SZ-UC] hires occasionally, mainly for app development. [UA-SZ-UC] usually when the software team is overloaded or they need extra help with design.

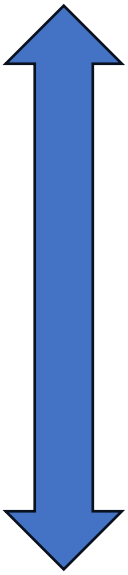
	Frequency, changes, areas and tasks	Participant ID
Frequently		
	Hires freelancers monthly; focuses on **web design, programming**, and **photo/video services**; has relied on same web freelancer for 3 years but outsources smaller projects.	[ES-AM-IA]
	Regularly hires freelancers when the internal team lacks specific skills; freelancers used for **highly specialized tasks** that would be inefficient to train in-house staff for.	[RS-AB-AMATG]
	Frequently hires freelancers; mostly **developers**, also **designers** and **trainers** for **workshops** or **evaluation/raiser** tasks.	[PL-ND-MQ]
	Hires freelancers regularly but **frequency varies yearly**; peak in 2023; most hired for **technical writing** and **programming**; prefers former employees; has faced **collaboration issues**	[IDN-PT-JCS]
	Occasionally hires freelancers (every 2–3 years) for **app development** in IT	[RO-CT-SCA]
	Hires freelancers **occasionally** to cover **increased software development workload** or **design tasks**.	[UA-SZ-UC]
Occasionally		

Table 2. Freelancer hiring context.

1.3.2 Analysis of competencies

Across nearly all freelance profiles, COMMUNICATION stands out as crucial competence (26.8% of the total responses). Companies-participants consistently emphasize the importance of being able to interact smoothly with teams and clients, clearly express ideas, ask the right questions, and keep stakeholders informed (e.g. [ES-AM-IA, IDN-PT-JCS, RO-CT-SCA]; see Table 3). However, challenges were also noted, with some freelancers requiring repeated clarifications or struggling to handle client interactions in an efficient way [IDN-PT-JCS, UA-SZ-UC]. Proficiency in English is particularly valued for teams with an international outlook [UA-SZ-UC].

Strong TECHNICAL SKILLS tailored to the project: programming, software development, dashboards, or applied mathematics, were ranked as other top priority (24.3% of the responses) when selecting freelancers [IDN-PT-JCS, PL-ND-MQ, UA-SZ-

UC]. However, some clients found gaps, noting that despite charging high fees, certain freelancers lacked the hands-on expertise expected [RS-AB-AMATG, IDN-PT-JCS]. Digital literacy and the willingness to learn new tools, such as AI technologies, also emerged as valuable traits [IDN-PT-JCS, UA-SZ-UC].

On the other hand, PERSONAL CHARACTERISTICS like self-organization, the ability to learn independently, and assertiveness, knowing how to set boundaries politely, were also highlighted (22.0% of responses). Some companies pointed out that freelancers often needed too much guidance before fully engaging in their work [RO-CT-SCA, IDN-PT-JCS]. Autonomy and self-discipline are seen as essential to maintain productivity, without constant supervision [PL-ND-MQ, UA-SZ-UC]. Motivation and passion further drive freelancers' engagement and adaptability, helping them integrate quickly into new projects [RS-AB-AMATG]. In a few cases, companies reported a general lack of soft skills, without detailing specific areas, but implying deficits in interpersonal or professional behaviours/conducts [PL-ND-MQ].

In terms of PROJECT MANAGEMENT, time management and meeting deadlines emerged as common concerns. Several companies reported issues with freelancers failing to prioritize tasks properly or managing their workload effectively [ES-AM-IA, UA-SZ-UC]. Commitment also plays a role here; some freelancers tend to take on too many projects or focus only on preferred assignments, neglecting less appealing but necessary tasks [ES-AM-IA].

Adaptability and readiness to engage quickly with new projects were noted as important for maintaining good professional relationships. Companies appreciate freelancers who respond well to feedback and can flexibly adjust to project needs [RO-CT-SCA, UA-SZ-UC, PL-ND-MQ].

TEAMWORK AND COLLABORATION remain central, especially in situations where freelancers are expected to integrate closely with in-house teams. Some responses underlined the need for freelancers to be cooperative, available, and responsible partners [IDN-PT-JCS, ES-AM-IA, PL-ND-MQ].

Finally, for one company, basic LEGAL AND ADMINISTRATIVE compliance was a non-negotiable requirement: like being properly registered as self-employed and up to date with social security requirements ([ES-AM-IA]).

Main category	Competency group	Participant ID
COMMUNICATION	Clear, open client communication	[IDN-PT-JCS], [PL-ND-MQ], [RO-CT-SCA], [RS-AB-AMATG], [UA-SZ-UC]
	Miscommunication and unclear interaction	[IDN-PT-JCS], [UA-SZ-UC]
	Fluent, effective stakeholder dialogue	[ES-AM-IA], [IDN-PT-JCS], [RO-CT-SCA]
	(English) Language proficiency	[UA-SZ-UC]
PERSONAL ATTIBUTES	Commitment & reliability	[ES-AM-IA]
	Assertiveness & boundaries	[ES-AM-IA]
	Motivation & passion	[RS-AB-AMATG]
	Problem-solving / proactivity	[PL-ND-MQ]
	Readiness & autonomy / self-organization	[RO-CT-SCA], [IDN-PT-JCS]
	Self-discipline, work-discipline & autonomy	[PL-ND-MQ], [UA-SZ-UC], [ES-AM-IA]
	Low level of soft skills, soft skills	[PL-ND-MQ]
PROJECT MANAGEMENT	Time management & deadlines	[ES-AM-IA], [UA-SZ-UC]
	Time management, readiness and adaptability [also to maintain relationships]	[RO-CT-SCA], [UA-SZ-UC], [PL-ND-MQ]
TEAMWORK	Teamwork & collaboration	[IDN-PT-JCS]
	Teamwork & availability, responsibility	[ES-AM-IA], [PL-ND-MQ], [RO-CT-SCA], [RS-AB-AMATG]
TECNICAL COMPETENCES	Technical skills: programming	[ES-AM-IA], [IDN-PT-JCS], [PL-ND-MQ], [RO-CT-SCA],

Main category	Competency group	Participant ID
		[RS-AB-AMATG], [UA-SZ-UC]
	Technical skills: software development	[IDN-PT-JCS], [UA-SZ-UC]
	Digital literacy & learning agility (e.g., AI tools)	[IDN-PT-JCS], [UA-SZ-UC]
KNOWLEDGE OF FORMAL REGULATIONS	Legal & administrative, and social security compliance	[ES-AM-IA]

Table 3. Analysis of competences.

Based on the questions about the skills the company considers most important when selecting a freelancer (Q8) and whether there are any skills the company believes are universally important across different freelance roles (Q10), a word cloud is generated (Figure 1).

Figure 1. Word cloud of the essential skills.

Hard skills are the most important in-demand by companies in Ukraine and Indonesia. Other soft skills are required by all countries, although to a lesser extent by Ukraine. General qualities are rarely required by companies (Figure 2).

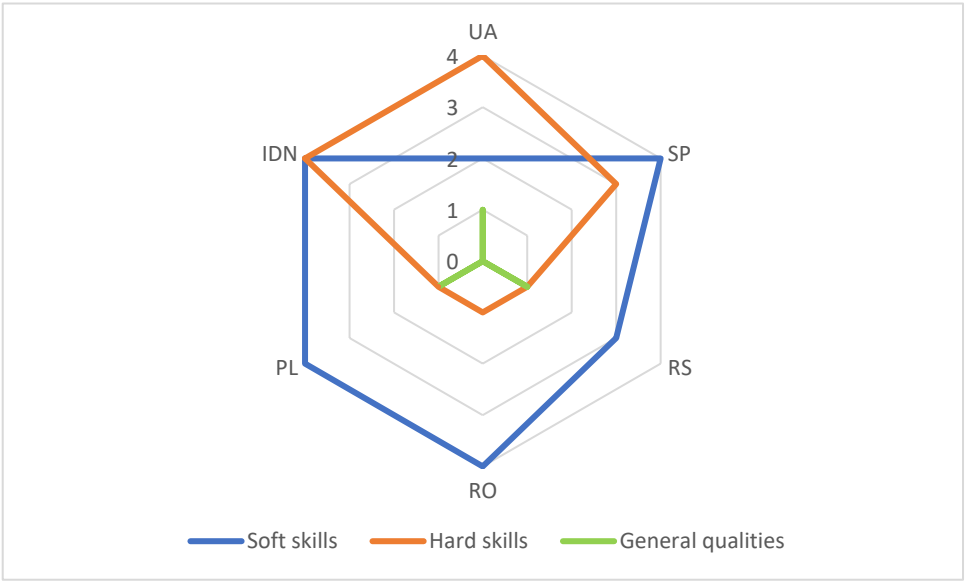


Figure 2. Star chart for most important skill type vs. country responses (companies' perspective).

There is a tendency for large companies (LE) to have a higher demand for soft skills (72.7% out of 11 responses), while SMEs have a more balanced distribution (almost 50% in each type) (Figure 5). For those with 15 or more years of experience in their sector, there is a lack of general skills (0%) compared to the group with less than 14 years of experience (16.7%) (Figure 4).

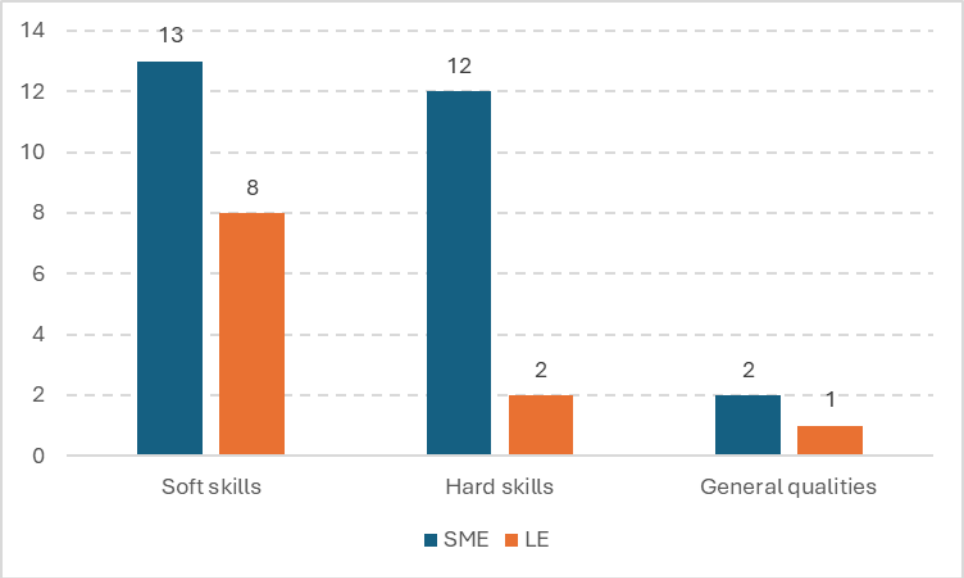


Figure 3. Most important skill type vs. company size.

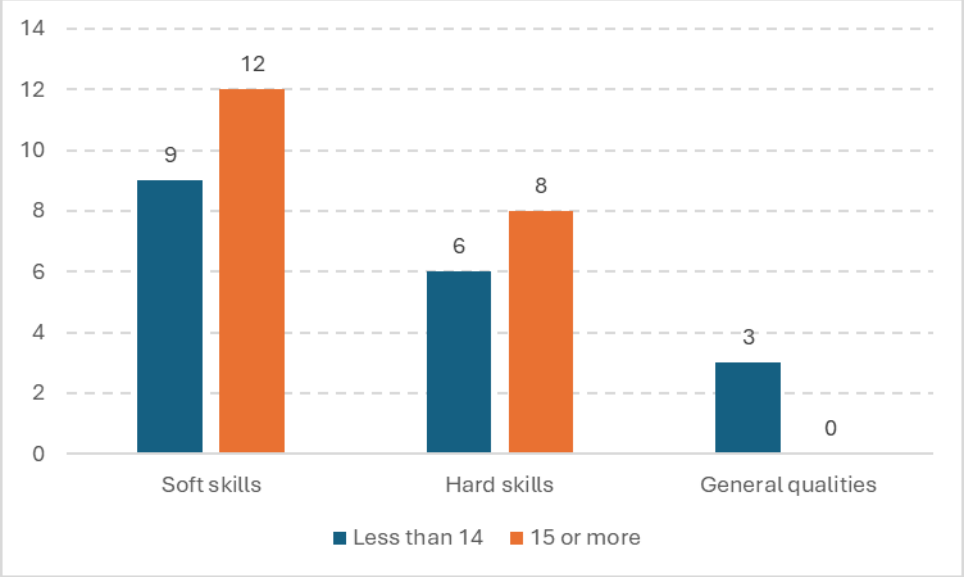


Figure 4. Most important skill type vs. company years of experience.

1.3.3 Associations responses vs. companies' classification variables

The correspondence analysis map in Figure 5 shows the associations between company characteristics, in particular: size and industry experience, and the competencies they value most when hiring freelancers (Chi-squared = 310.72, df = 81, p = 0.000).

The horizontal dimension appears to contrast companies that prioritize communication (COMMS) and technical expertise (TECEXP), on the left side, with those that prioritize project management (PROJMGMT), teamwork (TEAMWK), and personal attributes (PERSATRB), on the right. On the other hand, the vertical dimension offers a weaker separation but still suggests some clustering around company size.

Specifically, small and medium-sized enterprises (SMEs) and companies with 15 or more years of industry experience more often emphasized communication skills (COMMS) and technical expertise (TECEXP), indicating that these competencies are somewhat more important for experienced companies and SMEs. On the other hand, large companies (LE) and companies with less than 15 years in the sector align more with personal attributes (PERSATRB) and teamwork (TEAMWRK), which could indicate a greater interest in interpersonal and collaborative qualities.

Project management is located at the centre of the map, suggesting that it is a strongly valued competency across different companies and countries. And it is remarkable that knowledge of legal, financial, and accounting matters (KNWREGS) is quite far from the main group (far right), which could imply that this competency is distributed without a clear pattern, i.e., only in the case of Spain.

The ‘x’ or horizontal axis can be interpreted as an axis that discriminates the experience of the company and the ‘y’ or vertical axis as an axis of the size of the company, separating large from small and medium-sized companies.

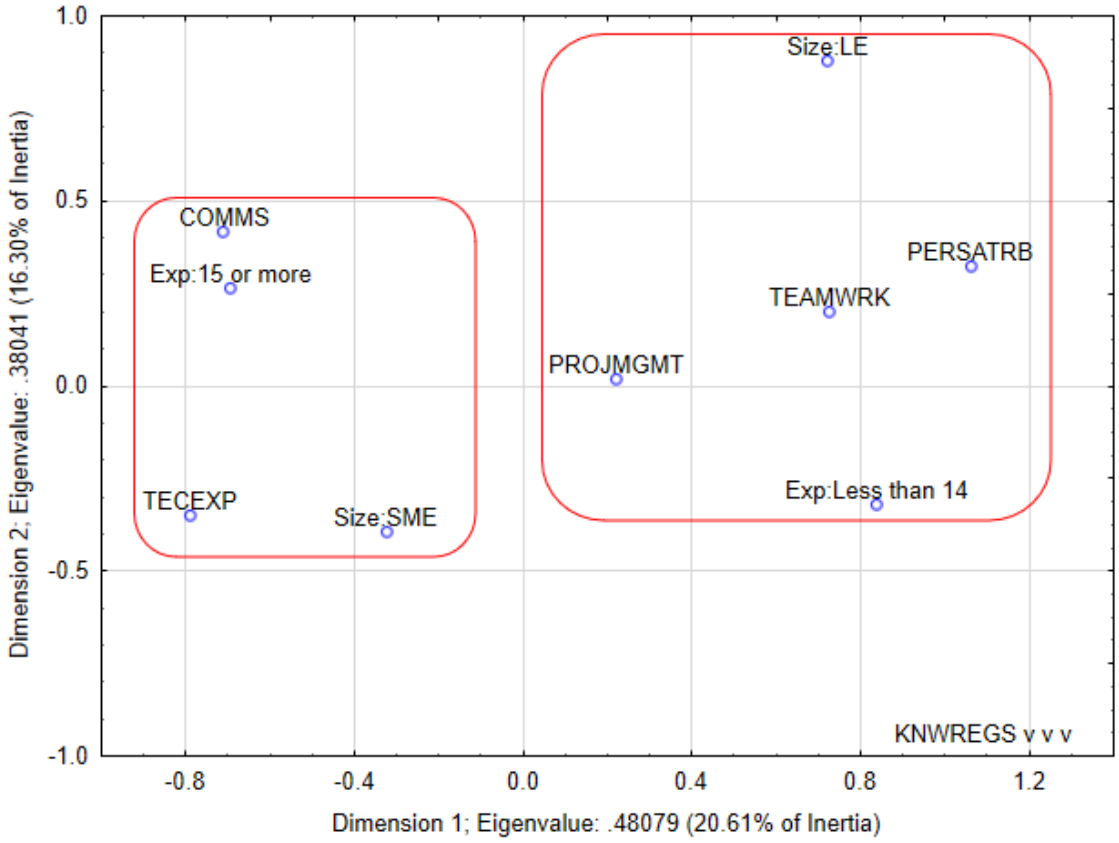


Figure 5. Positioning map. Response group vs. size and experience (companies).

In general, while this positioning map doesn't indicate a very strong polarization, it does suggest subtle preferences linked to organizational characteristics.

1.3.4 Search and selection methods and criteria do they prioritize

To select freelancers, companies apply **several selection criteria** (Table 4)**, which** often include technical competence, work discipline, and communication skills [IDN-PT-JCS, UA-SZ-UC]. Some organizations enhance their selection processes through **internal referral systems**, while others delegate the task to intermediaries or agencies to improve efficiency and reduce risk [RO-CT-SCA, RS-AB-AMATG].

Companies use a variety of methods to find and select freelancers, depending on their role and context. Several participants prioritize referrals and **word-of-mouth (WOM)**, highlighting the importance of trust and personal networks [ES-AM-IA, PL-ND-MQ].

Online platforms such as LinkedIn, glints.com, freelance.ru, and work.ua are also frequently used to advertise positions and search for talent [IDN-PT-JCS, RS-AB-AMATG, PL-ND-MQ]. In some cases, companies rely on **internal HR teams** or conduct direct searches themselves, particularly when they have prior experience working with freelancers [UA-SZ-UC, IDN-PT-JCS, PL-ND-MQ].

Main characteristic	Specific criteria	Participant ID
Criteria		
Previous experience	Prior collaboration with the freelancer	[IDN-PT-JCS]
Technical competence	Technical skills relevant to the role	[IDN-PT-JCS], [UA-SZ-UC]
Communication skills	Strong communication skills	[IDN-PT-JCS]
Work discipline	Expected work discipline	[UA-SZ-UC]
Personal recommendations	Word of mouth, referrals from friends or contacts	[ES-AM-IA], [PL-ND-MQ]
Agents/intermediaries		
Social media	Instagram, LinkedIn	[ES-AM-IA], [PL-ND-MQ], [IDN-PT-JCS]
Job platforms	glints.com, LinkedIn, Behance, freelance.ru, work.ua	[IDN-PT-JCS], [ES-AM-IA], [RS-AB-AMATG]
Company website	Posting job offers directly on company website	[IDN-PT-JCS], [PL-ND-MQ]
Internal referral system	Incentivized referral program by current employees	[PL-ND-MQ]
Direct search	Manual search and contact of potential candidates	[PL-ND-MQ], [UA-SZ-UC]
Intermediaries trusted	Pre-vetting based on reliability, experience	[RO-CT-SCA]

Table 4. Grouping of the selection criteria.

1.3.5 How AI is influencing the engagement of freelancers?

The analysis of how AI technology is reshaping freelancer engagement reveals a variety of developments (Table 5). Some companies now expect freelancers to actively use AI tools, gaining trust and credibility when they demonstrate up-to-date skills [ES-AM-IA]. In software-related tasks, the effective use of AI is especially valued, and freelancers are sometimes required to integrate such tools into their workflow [UA-SZ-UC, IDN-PT-JCS]. In programming roles, candidates are often asked about their ability to leverage AI platforms that assist in coding tasks [PL-ND-MQ]. At the same time, AI is

contributing productivity gains within in-house teams, thereby reducing the number of freelancers needed. For example, one company reduced its project team size from 100 to just 25 members thanks to AI support [IDN-PT-JCS]. Another company noted that, while AI may decrease the demand for freelancers, it might simultaneously increase their supply, as more individuals turn to freelancing when traditional employment becomes scarce [UA-SZ-UC]. Despite AI's growing influence, some companies have yet to observe any notable changes in how they hire or collaborate with freelancers [RO-CT-SCA, RS-AB-AMATG]. Overall, AI is gradually becoming embedded in freelance engagement processes, raising expectations and subtly transforming market dynamics.

Main category	Specific way mentioned	Participant ID
Increased expectation of AI use	More confidence if freelancers use AI; distrust if they don't keep up to date; asked to use AI to generate content ideas	[ES-AM-IA]
	AI tools important for programmer freelancers; asked about AI during recruitment	[PL-ND-MQ]
	Expected to use AI in development environments; appropriate use is valued	[UA-SZ-UC]
Challenges / new market dynamics	Possible reduction of freelance demand balanced by more freelancers entering the market due to fewer traditional jobs	[UA-SZ-UC]
	Freelancers required to learn and use AI tools for tasks	[IDN-PT-JCS]
Reducing freelancer demand	Fewer freelancers needed as in-house teams become more productive with AI; team reduced from 100 to 25	[IDN-PT-JCS]
No significant influence	No noticeable impact on freelancer engagement	[RO-CT-SCA], [RS-AB-AMATG]

Table 5. Classification of responses on how AI is influencing the engagement of freelancers.

1.3.6 Freelancers vs. permanent employees: advantages and disadvantages of working and hiring

Hiring freelancers offers companies cost **savings and financial flexibility** by reducing expenses related to social security, benefits, and other long-term employment costs [ES-AM-IA, IDN-PT-JCS], PL-ND-MQ, UA-SZ-UC]. Many highlight the advantage of scaling teams up or down based on project needs, avoiding unnecessary payroll during slow periods [PL-ND-MQ, RO-CT-SCA, UA-SZ-UC]. Additionally, freelancers often bring highly specialized skills that companies lack internally, enabling quick solutions for niche problems [RO-CT-SCA, AB, UA-SZ-UC].

However, this flexibility comes with notable risks. Participants pointed out that freelancers may take on too many projects, leading to missed deadlines or even disappearing temporarily [ES-AM-IA, RO-CT-SCA, UA-SZ-UC]. Integration challenges also emerged, as freelancers can struggle to communicate effectively or adapt to

internal processes, which sometimes results in quality issues that the core team must fix [IDN-JCS], [RS-AB-AMATG], ND]. Moreover, concerns about legal compliance, data security, and the risk of relying on direct payments without secure platforms were frequently mentioned [ES-AM-IA, PL-ND-MQ, RS-AB-AMATG, UA-SZ-UC]. Ultimately, while freelancers provide crucial adaptability and expertise, companies remain cautious of the trade-offs in control, continuity, and trust.

Main category	**Specific advantage or disadvantage**	**Participant ID**
ADVANTAGES		
Cost efficiency & financial flexibility	Lower social security or benefits costs; save on permanent staff overhead; avoid costs during low workload periods	[ES-AM-IA], [IDN-PT-JCS], [PL-ND-MQ], [UA-SZ-UC]
	No obligation to keep people when projects end; avoids paying employees without work	[PL-ND-MQ]
Flexibility & scalability	Ability to hire per project; scale team up or down easily	[RO-CT-SCA], [UA-SZ-UC], [ES-AM-IA]
	Can quickly solve specific problems by bringing in specialized talent	[RS-AB-AMATG], [UA-SZ-UC]
Access to specialized skills	Brings high-level expertise in niches or tech areas not available in-house	[RO-CT-SCA], [RS-AB-AMATG], [UA-SZ-UC]
Reduced HR / management load	Less bureaucracy, fewer internal HR processes needed	[ES-AM-IA]
Higher dedication / proactivity (perceived)	Sometimes more hard-working, with more “street sense” and decisiveness	[ES-AM-IA]
DISADVENTAGES		
Risk of project delays / unreliability	Freelancers may take on too much work, fail on deadlines, or disappear temporarily	[ES-AM-IA], [RO-CT-SCA], [UA-SZ-UC]
Integration & communication challenges	May have difficulties integrating into teams or communicating with clients, harming project flow	[IDN-PT-JCS], [RS-AB-AMATG], [UA-SZ-UC]

Main category	Specific advantage or disadvantage	Participant ID
Quality inconsistency & rework needs	Sometimes deliver results below expectations, requiring internal team to revise or fix errors	[IDN-PT-JCS], [RS-AB-AMATG], [PL-ND-MQ], [UA-SZ-UC]
Legal issues: Compliance risks/ intellectual property& data risks	Problems with "false freelancers," irregular tax practices, or contract clarity	[ES-AM-IA], [PL-ND-MQ]
	Concerns over confidentiality, security, and IP breaches	[UA-SZ-UC]
Team synergy / cohesion weaker	Less continuity and synergy than with full-time staff	[RS-AB-AMATG], [RO-CT-SCA]
Lack of control & transparency	Hard to monitor work hours, tools, or concurrent projects	[PL-ND-MQ]
Platform / payment security risks	Direct deals risk payment issues or incomplete work	[RS-AB-AMATG]

Table 6. Classification of advantages and disadvantages of hiring and working with freelancers.

Based on a set of three questions related to the advantages and disadvantages of hiring and working with freelancers (Appendix 5, Q13, Q14, Q15), the following results were obtained and are illustrated in Figures 6 and 7. Assuming three responses per participant across the three questions, the sentiment distribution reveals a predominance of negative perceptions over positive ones in most countries. Ukraine (UA) shows exclusively negative sentiment, with two moderately negative responses and no positive mentions. Spain (SP) presets a balanced outlook, with two moderately negative and two moderately positive sentiments, indicating a cautious but even-handed view. Serbia (RS) reports only moderately negative sentiment (2 responses), reflecting a consistently critical stance. Romania (RO) displays mixed opinions, with one very negative, one moderately negative, and two moderately positive responses, suggesting divided opinions. Poland (PL) exhibits the broadest sentiment range, including one very negative, four moderately negative, three moderately positive, and one very positive sentiment, indicating both concern and optimism. Indonesia (IDN) shows a slight positive tendency, with one moderately negative and one very positive sentiment recorded. Overall, the data suggests a general trend toward negative

sentiment across countries, with isolated moderate and strong positive responses, suggesting general reservations toward the topic assessed. The remaining responses were classified as neutral by the software.

Country	NEGATIVE	Very negative	Moderately negative	POSITIVE	Moderately positive	Very positive
UA	2	0	2	0	0	0
SP	2	0	2	2	2	0
RS	2	0	2	0	0	0
RO	2	1	1	2	2	0
PL	5	1	4	4	3	1
IDN	1	0	1	1	0	1

Figure 6. Freelancers - Sentiment analysis by country (table).

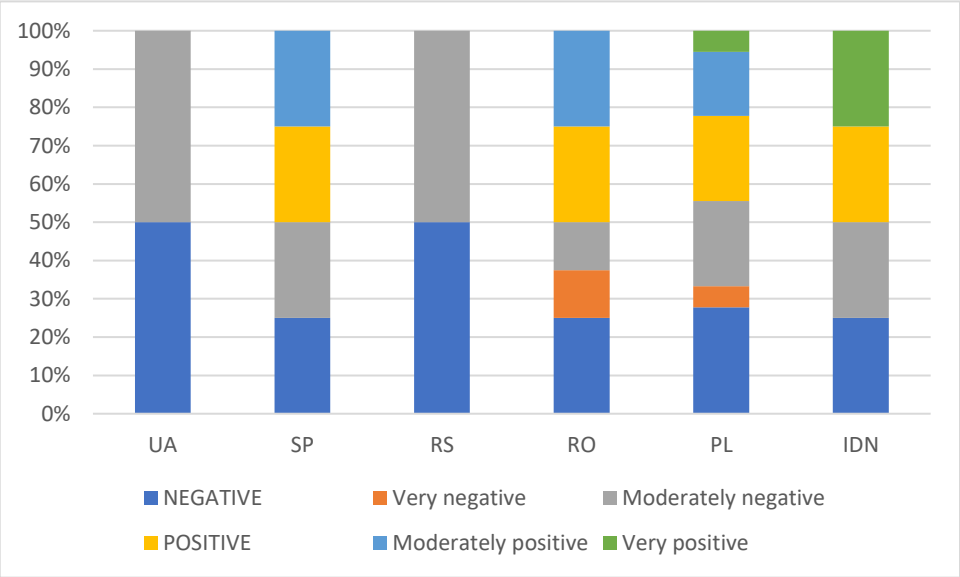


Figure 7. Freelancers- Sentiment analysis by country.

1.3.7 Internal strategies or policies related of hiring freelancers

Several companies reported implementing structured strategies for recruiting and integrating freelancers. One example involves a comprehensive internal process encompassing selection, onboarding, support, and offboarding, with project managers providing continuous oversight throughout the collaboration [UA-SZ-UC]. Another

firm facilitates freelancer integration by introducing them to the team and including them in regular meetings to ensure smooth collaboration [ES-AM-IA]. Some companies rely on official freelance platforms, using formal contracts and escrow systems to ensure security and reliability [RS-AB-AMATG]. Others maintain a preferred pool of freelancers for tasks such as design and programming, contacting them based on availability [ES-AM-IA]. A project-based hiring model is also common, allowing firms to manage costs and terminate collaborations without long-term commitments [PL-ND-MQ]. In certain regions, the cost-efficiency and flexibility of freelance work are major drivers, valued by both companies and freelancers [IDN-PT-JCS]. However, not all firms follow structured procedures; some manage freelance engagements on a case-by-case basis [RO-CT-SCA].

Main Category	Specific strategy or policy	Participant ID
Structured recruitment & onboarding	Internal vision and procedures for searching, agreement, onboarding, support, and offboarding of freelancers. Intensive onboarding to procedures and coding guidelines.	[UA-SZ-UC]
	Introduction of freelancer to team and integration into team meetings and workflow.	[ES-AM-IA]
Platform-based hiring	Use of official freelance platforms, creation of formal contracts, and use of escrow payment systems.	[RS-AB-AMATG]
Preferred freelancer network	Selection of favourite freelancers for specific needs (e.g., design, programming), hiring availability, and onboarding them accordingly.	[ES-AM-IA]
Project-based hiring preference	Preference for project-based hiring to reduce long-term costs and allow quick termination when the project ends.	[PL-ND-MQ]
Cost-efficiency & flexibility	Hiring freelancers is more cost-efficient; workers prefer freelancing due to greater flexibility and freedom.	[IDN-PT-JCS]
Talent availability & platforms	Access to skilled freelancers through platforms enhances international collaboration and competition.	[IDN-PT-JCS]

Main Category	Specific strategy or policy	Participant ID
Case-by-case hiring (no formal strategy)	No formal policy; freelance hiring is managed based on individual project needs.	[RO-CT-SCA]

Table 7. Classification strategies and policies.

1.3.8 Evolution of demand for freelance work in the sector

The analysis reveals a mixed picture regarding the recent evolution of freelance work demand (Table 8). Several companies have reported an increase in demand, primarily driven by the need to reduce costs and the flexibility freelancers provide for small-scale or short-term projects [ES-AM-IA, IDN-PT-JCS]. In some cases, this increase is linked to market dynamics, such as the need to remain in areas like social media marketing, or to meet client preferences for known freelancers [IDN-PT-JCS]. In Poland, a surge of freelancers has been observed following layoffs in the IT sector, however, only a small fraction meets job requirements, and many eventually seek long-term employment stability [PL-ND-MQ]. On the other hand, some firms report no noticeable change, citing consistent access to freelancers or a continued preference for in-house staff to ensure service quality [RS-AB-AMATG, RO-CT-SCA, UA-SZ-UC]. The latter notes that while pressure for flexibility exists, it has not translated into

significantly higher demand yet. Overall, while some sectors are clearly leaning more on freelancers, others remain steady or cautious in their approach.

Observed increase?	Reason	Participant ID
Yes	Cost savings, especially for small/regional projects.	[ES-AM-IA]
	High demand from companies, but declining supply of highly qualified freelancers.	[ES-AM-IA]
	In-house team capacity limits: freelancers hired when workload is too high.	[IDN-PT-JCS]
	Client preferences: Some clients request specific freelancers they've worked with.	[IDN-PT-JCS]
	Market competition: companies hiring freelancers to improve branding and reach.	[IDN-PT-JCS]
Yes (indirectly)	Oversupply of freelancers due to layoffs in the IT market.	[PL-ND-MQ]
	Many candidates are seeking freelance roles, but few meet the requirements.	[PL-ND-MQ]
	Freelancers seek stability and request permanent roles.	[PL-ND-MQ]
No	The volume and nature of freelance work have remained stable.	[RO-CT-SCA]
	Access to freelancers has been stable thanks to VIP accounts on platforms.	[RS-AB-AMATG]
Not significantly	Companies prioritize service quality/predictability, but better with internal employees.	[UA-SZ-UC]
	Cost and flexibility pressures suggest freelancing may become more relevant, but no clear increase yet.	[UA-SZ-UC]

Table 8. Increase or decrease in demand for self-employed workers.

1.3.9 Factors that have driven and barriers that have limited the growth of freelance work

Companies identified both internal and external factors that have contributed to the growth of freelance hiring. Many emphasize the importance of flexibility and cost

control, especially in uncertain or saturated markets [ES-AM-IA, PL-ND-MQ]. The complexity and volume of projects also create demand for external talent, especially in high-demand or highly specialized tasks [RS-AB-AMATG]. Cultural and legal alignment has enabled companies such as [UA-SZ-UC] to collaborate efficiently with international freelancers in response to geopolitical changes. However, several barriers persist. In Spain, a control-oriented business culture and the perception of high freelancer costs continue to limit adoption [ES-AM-IA]. Other companies simply have not experienced the need, relying instead on stable internal teams or only hiring freelancers when specific projects arise [RO-CT-SCA, PL-ND-MQ, RS-AB-AMATG]. Some firms, like [UA-SZ-UC], express openness but only use freelancers when internal resources fall short. In summary, while the freelance model is considered strategically valuable, its growth remains contingent upon organizational culture attitudes, workload fluctuations, and the nature of projects.

Figure 8 and Figure 9 present word cloud of drivers and barriers respectively. A summary of drivers and barriers presents Table 9.

Figure 8. Word cloud of drivers for hiring freelancers.

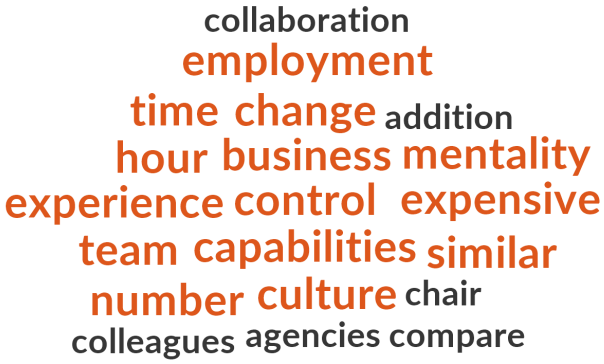


Figure 9. Word cloud of barriers for hiring freelancers.

Justification / description	Participant ID
DRIVERS	
Flexibility and better expense visibility.	[ES-AM-IA]
Fatigue with internal teams and desire for new, motivated profiles.	[ES-AM-IA]
Quality of freelancers as an external condition for hiring.	[IDN-PT-JCS]
Market volatility requires cost flexibility, hiring freelancers instead of full-time staff	[PL-ND-MQ]
Size and complexity of projects determine freelance needs.	[RS-AB-AMATG]
Cost-effectiveness, flexibility, and ability to hire abroad post-invasion, maintaining legal and cultural alignment	[UA-SZ-UC]
BARRIERS	
Business culture and mindset: preference for control and perception that freelancers are expensive.	[ES-AM-IA]
Number of projects available vs. freelancers are hired only when needed.	[PL-ND-MQ]
Existing team structure meets project needs, no pressure to expand freelance hiring.	[RO-CT-SCA]
Small/local projects can be handled in-house, so freelancers aren't required.	[RS-AB-AMATG]
No preset restrictions, but preference is to hire freelancers only when understaffed.	[UA-SZ-UC]

Table 9. Classification of drivers and barriers for hiring freelancers.

1.3.10 Summary

Overall, it seems that freelance work plays a valuable role for many companies, whether as a regular part of their structure or as an occasional solution for more specific or additional tasks. Companies seem to adopt varied approaches to freelance hiring, depending on their size, the volume of the project, and the type of expertise they need. Some companies collaborate on a regular basis, while others do so occasionally in response to specific needs.

When selecting freelancers, companies often highlight the importance of effective communication, technical skills, and a strong sense of commitment and other personal attributes. They look for professionals who not only perform well but also adapt easily

to team dynamics, accept feedback constructively, and approach their work with proactivity and organization. Wood et al. (2019) states that companies are seeking not only high-level technical knowledge but also competences in communication or project management, and interculturality [as personal attribute in our study], areas in which many freelancers lack formal training or experience. In line with the study of Kitching & Smallbone (2012), particularly in knowledge-intensive sectors, these are increasingly expected to demonstrate self-management, client handling, and project delivery skills as well as technical expertise.

According to the correspondence analysis, SMEs and more experienced companies tend to place greater emphasis on communication and technical skills. In contrast, larger or newer companies seem to lean more toward collaborative and personal qualities.

Keyword analysis (word clouds) shows that technical skills are the most in-demand by companies in Ukraine and Indonesia. All countries require other soft skills, although to a lesser extent in Ukraine. Furthermore, there is a tendency for large companies to have a higher demand for soft skills, while SMEs show a more balanced distribution between soft and hard skills.

Trust often plays a central role, which is why many rely heavily on referrals and WOM recommendations from their own networks. While some firms take advantage of online platforms like LinkedIn or specialized freelance sites to find talent, others prefer to manage the process internally through their HR teams or direct searches. Ultimately, the approach varies, but the common thread is finding freelancers who are efficient, competent, dependable, and able to collaborate effectively.

AI technology is progressively reshaping how companies engage with freelancers, though its impact varies across contexts. Some firms now expect freelancers to demonstrate fluency in AI tools, particularly in software-related roles where integration of AI into workflows is becoming a norm [UA-SZ-UC, IDN-PT-JCS]. In programming, candidates are increasingly evaluated on their ability to use AI-assisted coding platforms [PL-ND-MQ]. However, the rise of AI is also reducing the reliance on freelance labour in some companies, as automation allows for smaller, more efficient teams [IDN-PT-JCS]. At the same time, AI may indirectly expand the freelance market,

as workers displaced from traditional roles turn to freelancing [UA-SZ-UC]. Despite these shifts, some companies report no noticeable changes in their freelance collaboration practices yet [RO-CT-SCA, RS-AB-AMATG].

Alongside the influence of AI, freelance hiring strategies vary in structure and formality. Some companies have developed well-defined procedures for recruitment, onboarding, and project offboarding, ensuring alignment with internal standards and workflows [UA-SZ-UC]. Others emphasize integration by involving freelancers in team meetings and maintaining continuity through trusted freelance networks [ES-AM-IA]. The use of platforms with formal contracts and escrow systems is also gaining traction, enhancing transparency and security [RS-AB-AMATG]. In contrast, several firms continue to approach freelance collaboration on a project-by-project basis, driven by immediate needs or cost considerations [RO-CT-SCA, PL-ND-MQ].

However, hiring or working with freelancers provides companies significant cost savings and flexibility, allowing them to scale teams up or down as projects demand and tap into specialized expertise not available in-house. Yet, many highlight the challenges of integration, communication, and maintaining consistent quality, which often requires the intervention of internal teams to resolve issues. Legal uncertainty, concerns about data security, and less control over freelancers' workload further exacerbate the risks. Overall, while freelancers are a valuable strategic resource, companies are aware of the disadvantages in terms of reliability, continuity, and trust.

Sentiment analysis of participant responses reveals more scepticism than enthusiasm regarding freelance trends, especially in relation to advantages and disadvantages. Ukraine shows exclusively negative sentiment, while Serbia maintains consistently critical views. Spain presents a more balanced picture, with both positive and negative feedback. Romania’s responses reflect division, whereas Poland reveals the widest emotional spectrum, including both strong concern and optimism. Indonesia leans slightly positive, but the general pattern across countries indicates a predominance of cautious or negative attitudes, with only a few isolated positive notes.

Companies appear to be navigating the evolving freelance landscape with mixed feelings. Some embrace structured systems and technology, while others remain cautious due to uncertainty or cultural barriers. AI is emerging as both a tool and a

disruptor, shifting expectations and redefining roles. In this transition, the freelance market faces growing complexity, shaped by strategic planning, technological change, and fluctuating sentiment across regions.

In the responses regarding whether an increase in demand for freelance work has been observed, the data reveal a mixed perception regarding the demand for freelance work in recent years. Several companies report an increase in demand driven by profitability, project-based needs, client preferences, and market competition, particularly in marketing and IT [ES-AM-IA, IDN-PT-JCS, PL-ND-MQ]. However, challenges such as a limited supply of skilled freelancers and concerns about instability persist. Other companies report stable demand, citing consistent access to freelancers or a preference for in-house teams to ensure quality and predictability [RS-AB-AMATG, RO-CT-SCA, UA-SZ-UC]. Overall, while freelance work is gaining ground in some contexts, the trend is not uniform across all industries or regions.

Several companies, particularly in marketing and IT, recognize that freelance hiring offers valuable flexibility and cost efficiency in managing complex, high-volume or short-term projects. External circumstances, such as geopolitical shifts, have also encouraged some organizations to adopt freelance models across borders due to cultural and legal compatibility. However, barriers remain, particularly in regions like Spain, where traditional business cultures and perceptions about control and cost limit wider adoption. For many firms, freelance work is not a default strategy but rather a response to specific project needs or internal capacity gaps. Overall, while freelancing is viewed as a practical and adaptive resource, its growth still depends heavily on organizational mindset and context.

Table 10 summarises the competence gap from freelancers' and companies' perspectives.

Category	**Freelancers' perspective**	**Companies' perspective**
Services & sectors	Client sectors: Wide variety across business, tech, content, and social services; sector	Needs vary by project; Web design, programming, app development, technical writing, audiovisual production,

Category	Freelancers' perspective	Companies' perspective
	focus varies somewhat by country.	training/workshops; specialized/non-core tasks.
Key skills & competences 	Emphasize technical skills (e.g., Adobe Suite, UX/UI, Figma, or SAP), alongside other soft skills (communication, time management, adaptability, other personal attributes, or abilities to maintain relationships).	Prioritize communication, technical capabilities, and personal attributes (as commitment); express concern about gaps in soft skills.
Client interaction & communication 	Use multiple channels (freelance platforms, profess. job portals, social media, referrals and other industry-specific environments); Building visibility and relationships is key.	(Question not done directly) Prefer referrals and networks; some rely on platforms, others on HR/internal systems; trust plays a central role.
- Communication	Highlight their ability to interact clearly with clients and collaborators, especially in remote and digital environments.	Highly valued; but some freelancers need repeated clarifications or struggle to communicate efficiently.
- Knowledge (technical & legal skills)	Mention tools and platforms (e.g., coding, design, marketing); along with legal and regulatory knowledge in specialized sectors.	Strong technical skills are a top hiring criterion; legal compliance (e.g., being properly registered) is a basic expectation.
- Personal attributes	Value traits like initiative, discipline, resilience, commitment, confidence, critical thinking, and independence.	Autonomy, organization, and assertiveness are critical; but some freelancers reportedly need too much guidance before engaging fully.
- Project management	Time management is crucial, particularly when handling multiple clients and time zones.	Similarly important; but some freelancers are seen as struggling with prioritization, overcommitment, or focusing only on preferred tasks.
- Positioning by experience	Experienced/older freelancers tend to value technical and project management skills	SMEs and experienced companies value communication and technical

Category	Freelancers' perspective	Companies' perspective
	more; while newer/younger ones focus on communication and teamwork.	expertise; while large or young firms emphasize teamwork and personal attributes.
AI's impact 	Seen as beneficial: speeds up work, fosters creativity; but human judgment remains crucial.	Mixed impact: some expect AI fluency; others see reduced need for freelancers; but AI also creates new freelance opportunities.
Challenges 	The market includes instability, market shifts, emotional pressure; needs constant learning and adaptability.	Include quality control, integration, communication, legal/data concerns; freelancers seen as flexible but not always reliable.
Motivations & benefits 	Freedom, growth, income, personal satisfaction; freelance evolution marked by learning and strategy.	Focus on cost-efficiency, flexibility, access to expertise; driven by project volume, instability, or strategic gaps
Hiring structure & strategy 	(Question not done); but freelancers adapt to diverse client structures.	Ranges from structured onboarding to ad hoc hiring; use of platforms with contracts growing.
Sentiment & trends 	Generally positive about freelancing future, but with nuance.	Predominantly cautious or negative, with regional variation.
Globalization & market reach	International clients offer better pay and setups but more pressure; freelancers value global reach.	Some embrace cross-border hiring; legal/cultural factors matter; resistance in traditional markets like Spain.

Category	Freelancers' perspective	Companies' perspective
		

Table 10. Competences gap table.

The findings outlined above have several important implications for the freelance ecosystem, particularly in terms of professional development, talent-client alignment, and platform strategy.

1. There appears to be a disconnect between what freelancers think they offer and how companies perceive them. For example, while many freelancers believe they communicate well, some companies report issues in this area (e.g., need repeated clarifications or struggle to communicate efficiently with client). This highlights the need for feedback loops: freelancers could benefit from regularly seeking client input to better understand expectations and areas for growth. Platforms and intermediaries could support this by integrating structured evaluations or peer reviews. For instance, they can adopt regular peer assessments common in agile teams and/or adopting elements from Scrum, such as 'sprint' reviews or retrospectives, could help improve the communication in collaboration with clients.
2. The fact that freelancers with different experience levels value different skills suggests that a one-size-fits-all training model is no longer effective. Newer freelancers often focus on improving communication, collaboration and relations with client, while more experienced ones concentrate on technical mastery and project leadership. This calls for personalized learning paths, where beginners create their soft skills and seasoned professionals enhance their strategic and technical abilities.
3. As both veteran freelancers and experienced companies place high value on technical and project management skills, it is clear that depth of expertise matter. Those who invest in becoming specialists or reliable project leads may be better positioned for long-term success. This could contribute to a more

professional freelance landscape, where reputation, reliability, and high-value skills are key differentiators.

4. Larger and younger companies often seem to emphasize teamwork and other soft skills, while SMEs and companies with greater industry experience focus more on communication and technical expertise. Freelancers can tailor how they present themselves based on the client: showcasing adaptability and close collaboration to appeal to big corporations, and demonstrating autonomy, efficiency, and technical acumen for smaller, established businesses.
5. While formal regulatory and legal skills were not a top priority across the board, they remain relevant in specific contexts. For freelancers working in regulated fields like energy, healthcare, or finance, legal compliance can provide a competitive advantage. Still, for the wider freelance market, these competencies tend to be valued only when aligned with specific client needs or industry demands. In these cases, the freelancer should be knowledgeable and willing to take microlearning courses or on-demand or self-paced short courses.

1.4 Results and analysis: Freelancers

1.4.1 Services offered

The services offered by the freelancers surveyed reflect a **considerable diversity**, although certain areas appear more frequently than others (Table 11).

A very prominent area was **digital marketing and commercial management**, with [ES-AS], [ES-EM] and [ES-VC] offering services ranging from social media analytics and website development to business mentoring and department leadership. Several participants provide **strategic or business consulting services**. [PL-DS] offers strategic consulting, [RO-AN] focuses on enterprise management, and [RO-AT] brings a more technical profile with ERP systems, automated payment solutions, and business intelligence reporting.

Software development is another recurring area (three participants). [RS-US] works in front-end development, [RO-RC] specializes in mobile app development, both native and cross-platform, and [PL-JS] combines software development with graphic design. In the **audiovisual and multimedia** field, [RS-AZ] offers video editing and animation services, [UA-VP] adds photography, video editing, and 3D modelling to their portfolio, and [PL-MJ] works as a video content creator. **Graphic and web** design are also mentioned, with [PL-JS] and [UA-OS] contributing to this area.

Translation was another mentioned category. [IDN-LNA] specializes in translating books and creating transcripts, while [UA-OC] provides a wide range of services including literary and technical translation, website, subtitling, and bilingual editing. **Content creation and writing** also emerged as a common service. [IDN-NID] focuses on web article writing and SEO optimization, while [RS-VA] engages in content creation, blog writing, and scientific research, highlighting both creative and technical aspects of the field.

Lastly, a unique role is offered by [IDN-PA], who works as a master of **ceremonies and personal assistant** to influencers or key opinion leaders.

Classification	Service type	Participant ID
Business, management and consulting	Business / strategy consulting / ERP	[PL-DS], [RO-AN], [RO-AT]
	Digital marketing and business management	[ES-AS], [ES-EM], [ES-VC]
	AI (but refers to business automatization)	[ES-AS]
Technology, development, and media production	Software / mobile / web development	[RS-US], [RO-RC], [PL-JS]
	Graphic and web design	[PL-JS], [UA-OS]
	Video, photography, and multimedia editing	[RS-AZ], [UA-VP], [PL-MJ]
Content, communication & language	Content creation / writing	[IDN-NID], [RS-VA]
	Translation and app localization??	[IDN-LNA], [UA-OC]
Other/support and personal services	Moderation / personal assistance / presentations	[IDN-PA]

Table 11. Classification of services offered by freelancers.

As can be seen in Figure 10, the interviewers were asked to **identify a variety of two sectors in each country**.

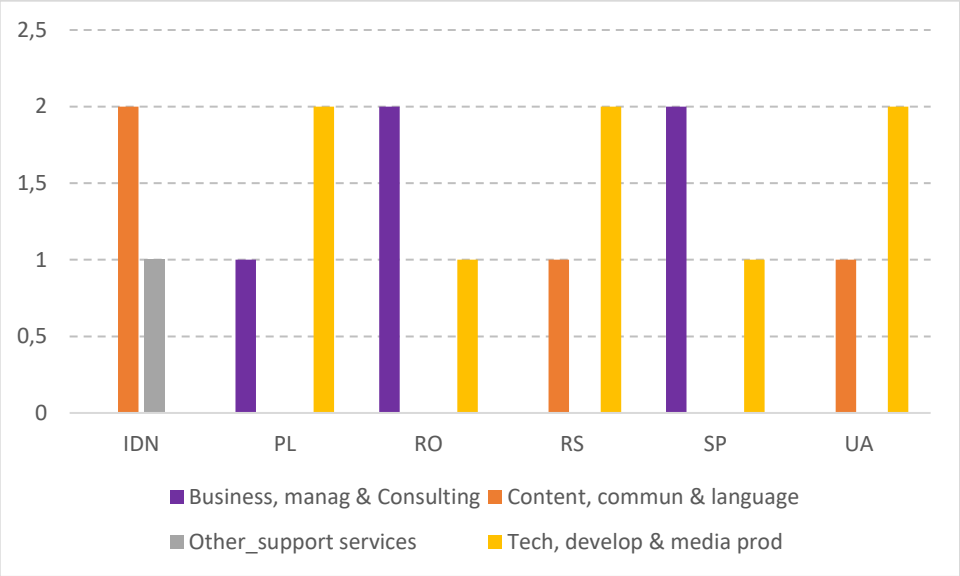


Figure 10. Number of freelancers interviewed by country.

1.4.2 Clients sector

Based on the freelancers' answers, it seems that their clients (Question 5: "In what industries or domains are your clients usually operating?") come from a wide range of industries. Figure 11 shows a word cloud of the most common sectors and domains among the freelancers interviewed. The words that appear together and bigger in the centre and are coloured orange are the occupations that appear most often in the answers given to this question. The common appearance of "education," "content," and "digital" implies that these topics are central to the discussions or responses analysed. This could mean respondents are highly concerned with or involved in digital education or content creation. Then, the presence of "health," "medicine," "healthcare," "pharmaceuticals," and "physiotherapist" suggests significant discussion around health-related fields. Other words such as "foreign," "international," and "banking" indicate that cross-border or international aspects are relevant themes.

Figure 11. Word cloud of the most common sectors and domain.

A deeper analysis shows, in this question, a significant number of participants mentioned working with clients in healthcare, medicine or biotechnology (Table 12). For example, in Spain, freelancers [ES-AS], [ES-EM], and [ES-VC] often work, among other sectors, with medical professionals like dentists, dermatologists or physiotherapists. In a similar way, [PL-JS], [RS-VA] and [UA-OC] also talked about working with clients from laboratories or more broadly the medical sector.

Education also came up several times. [IDN-LNA] said they work with educational institutions and publishing houses and [UA-VP] also mentioned having clients in education, among other areas.

Another area that stood out was IT, software and engineering. Freelancers such as [PL-DS], [RS-US], and [UA-OC] mentioned they work with software developers or IT companies. Related to that, [IDN-NID] and [IDN-LNA] mentioned they are primarily focused on digital content and publishing, like for websites and online platforms.

Digital marketing, SEO and advertising also came up frequently. [IDN-PA], [UA-VP] and [ES-EM] all said they have clients in those fields, which shows how important online visibility has become lately.

Several freelancers said they mainly work with SMEs or small business clients. That was the case for [ES-EM], [ES-AS], [PL-JS] and [UA-OS]. They tend to cover all sorts of sectors and offer general or tailored services.

Then there is the beauty and fashion industries. [PL-MJ] and [PL-JS] talked about clients from those areas, and [ES-VC] said they've worked with beauty salons and centres too.

Other freelancers are more focused on industrial or technical clients. For example, [PL-DS] said they serve manufacturing clients, [RO-AN] mentioned electrical installations, and [RO-AT] works with companies in the food and textile industries.

There were also a few mentions of finance and banking: [ES-EM] and [UA-OC] both said they have clients in those areas, which suggests a demand for help with admin and finance-related stuff.

[UA-OC] also works in the psychology field, and [RS-AZ] said their clients are mostly freelancers and YouTubers, illustrating the increasing relevance of content creation.

In the case of [RO-RC] we can find a very mixed experience, i.e. starting with clients in transport, then dating, security, rentals and now energy. It really shows how flexible you need to be as a freelancer. And [UA-VP] also works in all kinds of sectors, from pharma to advertising, SEO, and even selling souvenirs and decorative items.

Sector	**Industry / domain**	**Participant ID**
Business & commerce	SMEs / small businesses / general services	[ES-EM], [ES-AS], [PL-JS], [UA-OS]
	Finance / banking / accounting	[ES-EM], [UA-OC]
	Retail / hospitality / crafts	[ES-VC], [UA-VP]
Communication, media & creative industries	Media / journalism / publishing	[IDN-NID], [IDN-LNA], [UA-VP]
	Digital marketing / SEO / advertising	[IDN-PA], [UA-VP], [ES-EM]
	Beauty / fashion / cosmetology	[ES-VC], [PL-MJ]

Sector	Industry / domain	Participant ID
	YouTubers / influencers	[RS-AZ]
Human services & social impact	Healthcare / medicine / Biotechnology	[ES-AS], [ES-EM], [ES-VC], [PL-JS], [RS-VA], [UA-OC]
	Education / academia / research	[IDN-LNA], [UA-VP]
	Psychology / mental health	[UA-OC]
	Dating / personal services	[RO-RC]
Technology, production & infrastructure	IT / software / engineering	[PL-DS], [RS-US], [UA-OC]
	Manufacturing / electrical / food / textile	[PL-DS], [RO-AN], [RO-AT]
	Automotive / transport / rental	[PL-MJ], [RO-RC]
	Security / energy / utilities	[RO-RC]

Table 12. Aggrupation of industries or domains of the freelancers' clients.

Overall, the variety of client industries shows how broad and flexible freelancing can be today (it is not just about one type of work), but about truly adapting to a changing market with many different demands.

1.4.3 Typical characteristic of your client companies

In the query about the typical characteristic of the clients, the freelancers reported **working with a wide range of companies**, both in terms of geographic location and size. Several freelancers, especially from countries such as Spain [ES-AS, ES-EM] and Romania [RO-AN, RO-RC], mentioned having both regional and international clients. For example, [ES-EM] works with clients not only in a regional scales (Andalusia and Madrid), but also in foreign countries such as Luxembourg, France, Mexico and the UK, while [RO-RC] highlighted that all of their clients are located outside of Romania, in places such as Israel, the USA and Sweden.

A local and regional focus remains prominent in some profiles, especially among freelancers from Poland [PL-JS, PL-MJ] and Indonesia [IDN-PA], who primarily serve

local SMEs in their respective regions. This contrasts with participants such as [RS-AZ] from Serbia, who described working with clients "from all over the world" without a specific regional focus.

Regarding company size, participants work with a wide variety of companies, but there is a clear predominance of SMEs. For example, [UA-OS] emphasized working with SMEs, startups and freelancers, often collaborating directly with marketing teams or business owners. [PL-DS] specified working with SMEs with up to 100 employees, while [RS-US] highlighted their focus on startups. While large organizations were also mentioned (e.g., [RO-AT] with companies with over 300 employees), they appear less frequently.

Notably, some freelancers hold strategic or management positions in these companies. [RO-AN], for example, has worked as a contract manager and deputy general manager for companies operating in the energy and industrial sectors, both in Romania and internationally.

Characteristics (scale and size)	**Participant ID**
International (Arabia, Luxembourg), **regional** in Spain (Madrid, Valencia, Andalucía), **small** clients	[ES-AS]
National and **international** (France, Luxembourg, UK, Mexico), regional focus in Andalucía	[ES-EM]
SMEs from Granada, Almería or Madrid (**regional**)	[ES- VC]
Local and international clients, variable size (small teams to large orgs)	[IDN-LNA]
International (Palo Alto), unknown size	[IDN-NID]
Local (Jakarta area), digital marketing	[IDN-PA]
Poland, **SME**, up to 100 employees	[PL-DS]
Local (South Poland), unspecified size	[PL-JS]
Local SMEs (car showrooms, online stores, beauty salons)	[PL-MJ]
Romania and abroad, large engineering firms (e.g. electrical installations), management roles	[RO-AN]
Romania, large companies (300+ employees), mostly IT dept	[RO-AT]

Characteristics (scale and size)	Participant ID
International clients (Israel, USA, Canada, Sweden), **small to mid-size** (≤50 employees)	[RO-RC]
Global (America, Europe, unspecified), mixed types	[RS-AZ]
Global, mostly smaller companies and startups	[RS-US]
International (mostly USA), **medium-size** companies	[RS-VA]
International (small companies and big corporations), R&D, marketing, HR departments	[UA-OC]
Ukraine, mostly SMEs/startups/sole proprietors, work with marketing and PMs	[UA-OS]
Mainly Ukraine, some Europe/USA due to war, clients range from individuals to businesses	[UA-VP]

Table 13. Freelancers' client characteristics.

Overall, the typical client profile is small to medium-sized, with great geographic diversity, often combining local/regional loyalty with global reach, reflecting the flexibility and adaptability of freelancers in an increasingly digital and remote work environment.

1.4.4 Channels used by freelancers

According to the channels of communication, freelancers reported using a wide variety of channels to find work, revealing patterns based on both geographical context and professional strategy (Table 14). A highly common channel was referrals and word-of-mouth (WOM), with freelancers like [ES-AS], [ES-VC], [PL-DS], [PL-JS], and [UA-VP] highlighting the power of personal connections in gaining client trust. In fact, some freelancers [UA-OC, IDN-PA] emphasized that recommendations from previous clients generated ongoing demand and a steady flow of projects.

Another prominent channel was the use of online platforms to find work (such as bestjobs.eu or Work.ua) or to specialize in freelance work (such as Upwork, Malt or Clash). Freelancers from different regions (in particular, Spain, Indonesia, Serbia, and Ukraine) mentioned these as essential in their initial client acquisition phases [IDN-NID, RS-US, RO-RC, UA-VP]. A group of Romanian freelancers [RO-AT, RO-AN] used other professional job portals (such as bestjobs.eu and ejobs.ro), or tender platforms

like ARIBA and SICAP-SEAP, particularly in highly regulated or B2B industries. These environments suit freelancers offering energy services, public procurement, or compliance-driven projects. However, for many, these platforms evolved from being a primary channel to a complementary one as their personal networks grew.

Social media platforms, especially LinkedIn, Facebook and Instagram, were also crucial for visibility and client engagement. Freelancers like [IDN-LNA], [RO-RC], and [PL-MJ] actively used LinkedIn or content-focused Facebook groups, while [UA-OS] relied on Instagram to attract clients with visual portfolios. [PL-MJ] mentioned using multiple social media tools alongside a dual Instagram strategy (one for personal engagement and another for showcasing professional work).

Interestingly, AI consulting emerged as a niche channel. [ES-EM] noted an increase in demand related to artificial intelligence services, showing how emerging tech trends are influencing how freelance work is sourced.

Lastly, some freelancers mentioned alternative professional environments as lead sources. For example, [PL-MJ] referenced networking developed while working at a BMW showroom, and [IDN-LNA] collaborated with a local translation agency, showing how physical spaces and industry-specific agencies also continue to play a role in freelance client acquisition.

Group	Channel Type	Participant ID
Professional apps	Freelance platforms (e.g., Upwork, Malt)	[ES-AS], [IDN-NID], [RO-RC], [RS-AZ], [RS-US], [RS-VA], [UA-VP], [RO-AT]
	Professional job portals (e.g., bestjobs.eu, ejobs.ro, Work.ua)	[RO-AT], [UA-VP]
Social media	Social media platforms (e.g., LinkedIn, Facebook, Instagram)	[ES-VC], [IDN-LNA], [PL-MJ], [PL-DS], [RO-RC], [UA-OS]
Personal networks	Word of mouth / referrals / personal networks	[ES-AS], [ES-EM], [ES-VC], [IDN-NID], [IDN-PA], [PL-DS], [PL-JS], [PL-MJ], [UA-OC], [UA-OS], [UA-VP]
Other	Professional environments (e.g., BMW showroom, local agency) or specialized bidding/tender platforms (e.g., ARIBA, SICAP-SEAP)	[IDN-LNA], [PL-MJ], [RO-AN]
	AI-related interest	[ES-EM]

Table 14. Channels used by freelancers.

1.4.5 Skills of freelancers

Once we have processed all competences together, we have found that COMMUNICATION was one of the second most frequently mentioned (19 responses) and valued competences across participants from various countries such as Spain, Poland, Romania, Serbia, and Ukraine [ES-VC, PL-JS, RO-RC, RS-US, UA-OS]; see Table 15). Freelancers emphasized the importance of expressing ideas clearly to both clients and collaborators, especially in fields like digital marketing, content creation, and design, where misunderstandings are common. Several professionals [IDN-NID, IDN-PA, RO-RC, RS-US, UA-OC, UA-OS] reinforced the importance of presenting offers convincingly and maintaining open, client-oriented communication, particularly in remote and digital work environments. The feedback offered also pointed to style-related issues. For instance, [RO-RC] emphasized how clear communication and

transparency are especially critical during interviews, which are often the only real moments of evaluation in freelance settings.

Even more importantly, with the majority of responses (26 responses, 30% of responses), freelancers shared a diverse range of TECHNICAL COMPETENCIES depending on their professional backgrounds. On one hand, [RO-AT] and [RO-RC] mentioned programming languages and data tools like SQL, Java, and SAP. On the other hand, [PL-MJ] and [UA-OS] pointed to their proficiency with Figma or Adobe Creative Suite, and photo and video editing tools. [ES-AS] and [IDN-NID] emphasized digital marketing skills and language proficiency, especially in the context of multilingual content creation or translation of content.

Feedback from clients is often focused on these technical areas. [ES-AS] noted that, although their work was generally praised, some clients expected more advanced design skills. [UA-OS] received comments asking for deeper UX research and animation abilities. [UA-VP] admitted the need for help with drawing human portraits and now sees AI as a useful tool to address that gap.

Other skills mentioned are the value of real, demonstrable expertise. [RO-AN] highlighted the importance of technical specialization, noting that freelancers are often hired for short, high-impact tasks where competence is critical. [PL-DS] echoed this, pointing out that understanding how to solve problems and apply analytical thinking is vital. [RO-AT], [IDN-NID], and [RO-RC] emphasized the need for strong problem-solving abilities or capabilities to quickly understand client needs and propose appropriate solutions.

In third position (17 responses), freelancers highlighted a wide range of PERSONAL ATTRIBUTES essential to freelance work. Traits like initiative, discipline, resilience, commitment, self-confidence, and critical thinking were consistently valued. [PL-DS] and [RO-AN] pointed out the importance of initiative and leadership, especially in coordination roles.

Self-motivation and the ability to work independently were also seen as essential for handling the uncertainty and autonomy of freelancing. [RS-AZ], [PL-DS], and others mentioned a strong work ethics and the ability to manage risk, particularly, in the

absence of a financial safety net. Additionally, [RO-AN] spoke about courage and decisiveness as key when taking on demanding, fast-paced assignments.

[UA-OC], [PL-JS], and [UA-OS] underlined that professionalism, or punctuality helped them sustain long-term relationships. Being open to learning and continuously improving was also seen as essential for growth. While some freelancers received suggestions such as to enhance their public image, i.e., their personal brand or online presence [PL-DS] (included in COMMUNICATION group), others reported not receiving any negative feedback at all [RS-AZ, RS-US, RO-AN, UA-OC, RS-VA], attributing this to good client alignment or roles where evaluation was less frequently.

Time management emerged as an important issue in the central competence group of PROJECT MANAGEMENT. Freelancers like [IDN-LNA], [RS-VA], and [UA-OS] pointed out that managing multiple projects simultaneously and across time zones is a great challenge that requires great organizational skill. Some, as [IDN-PA], admitted they struggled with overload and missed deadlines early in their careers, which taught them to develop better scheduling systems. In the case of [IDN-LNA], the participant mentioned a missed deadline due to time zone confusion, underscoring the importance of meticulous planning. Freelancers generally agreed that meeting deadlines and staying organized are essential for delivering reliable service.

Regarding TEAMWORK, although freelancing often involves working independently, several participants acknowledged that teamwork is important when projects require collaboration. [RO-RC], for example, noted that being able to work in teams becomes essential in shared projects. Team management was also highlighted by [PL-DS] and [RO-AN] as a key skill in roles involving coordination or leadership.

According to FORMAL REGULATIONS, in more regulated sectors, such as energy, legal and regulatory knowledge becomes essential. [RO-AN] emphasized the importance of being familiar with business, legal, and commercial frameworks, especially when preparing bids for international projects. In addition, [PL-DS] mentioned the importance of understanding contracts and data protection. A solid grasp of these formal requirements or regulations, both local and international, were seen as a key to building credibility and operating confidently.

The ability to MAINTAIN GOOD CLIENT RELATIONSHIPS was another major theme. Freelancers stressed the importance of empathy, attentiveness, and understanding client expectations. [PL-MJ] spoke about adapting to the client's vision, while [PL-JS] and [ES-EM] noted that empathy leads to greater satisfaction and loyalty. Reliability, trust, and consistently delivering high-quality work were seen as fundamental.

Main classification	Competences	Participant ID
COMMUNICATION	Effective communication / prevention of misunderstandings in relationships / international diversity	[ES-VC], [IDN-PA], [PL-DS], [PL-JS], [RO-RC], [RS-US], [RS-VA], [UA-OS]
	Communication / express ideas clearly	[IDN-NID], [IDN-PA], [RO-RC], [RS-US], [UA-OC], [UA-OS]
	Communication style (being too direct)	[ES-EM]
	Language and writing proficiency (English / Indonesian, translation, grammar)	[IDN-NID], [IDN-LNA]
	Public image (presentation / public speaking / personal branding)	[PL-DS]
	Self-promotion (no website) and online presence	[PL-DS]
PERSONAL ATTIBUTES	Courage and assertiveness	[RO-AN]
	Engagement / commitment	[PL-DS], [RO-AN]
	Creativity / visualization	[RS-AZ], [PL-MJ]
	(Inter)cultural awareness	[IDN-LNA]
	Negotiation skills	[RO-AN]
	Proactivity (initiative / self-confidence)	[PL-DS]
	Self-development	[UA-VP]
	Self-motivation / self-learning / continuous development	[ES-EM], [PL-DS], [UA-OS], [IDN-NID]
	Mental resilience/ stress management	[PL-DS]
	Work discipline (Discipline and strong work ethic)	[RS-AZ], [PL-DS]
	Anticipating problems	[ES-EM]

Main classification	Competences	Participant ID
PROJECT MANAGEMENT	Financial management and budgeting	[PL-DS]
	Invoicing / profitability / admin autonomy	[PL-DS], [ES-AS]
	Quality, professionalism, play a big role	[UA-OC], [PL-JS], [RO-RC], [UA-OS]
	Reliability / punctuality	[PL-JS], [UA-OS]
	Time management	[IDN-LNA], [RS-VA], [UA-OS], [UA-OC], [IDN-PA]
TEAMWORK	Teamwork (when required)	[RO-RC]
	Leadership/team management	[RO-AN], [PL-DS]
TECHNICAL COMPETENCES	Commercial knowledge / digital marketing and business model and	[RO-AN], [ES-AS], [PL-DS]
	Critical thinking, problem-solving	[IDN-NID], [RS-US], [PL-DS]
	Design tools (Drawing / artistic illustration)	[UA-VP]
	Design tools (visual, illustration, UI/UX)	[ES-AS], [UA-OS], [UA-VP]
	Design tools (Adobe Suite, Figma, UX/UI)	[UA-OS], [PL-MJ]
	Editing tools (photo/video)	[PL-MJ]
	Problem-solving and analytical thinking	[RO-AT], [IDN-NID], [RO-RC]
	Programming & data expertise (SQL, Java, C#, Oracle DB, SAP, Cognos, etc.)	[RO-AT], [RO-RC]
	Software/project delivery (quality, accuracy)	[PL-JS], [RO-RC]
	Technical expertise, project expertise (high-level-quality professional skill / ability to fulfil specialized project-based tasks)	[RO-AN], [RO-RC], [IDN-LNA]
	Understanding the requirements (Deep product or industry knowledge)	[IDN-LNA]

Main classification	Competences	Participant ID
	Work quality	[PL-JS], [RO-RC]
KNOWLEDGE OF FORMAL REGULATIONS	Legal / fiscal / accounting literacy or regulatory knowledge	[RO-AN], [PL-DS], [ES-AS]
	Contractual/legal compliance	[PL-DS]
	Risk awareness / (personal) financial continuity	[PL-DS]
ABILITY TO KEEP GOOD RELATIONSHIPS	Client understanding / empathy	[PL-MJ], [PL-JS], [ES-EM]
	Flexibility, adaptability, openness to feedback	[UA-OC], [UA-OS], [PL-MJ]
	Client understanding / empathy	[PL-JS], [PL-MJ], [RS-AZ]
	Adaptability (to different client profiles)	[RS-VA], [PL-DS], [IDN-NID]
	Client expectations (more services, lower cost)	[ES-VC]
	Openness to feedback (feedback culture and openness)	[RO-RC]

Table 15. Competences mentioned by freelancers.

In Figure 12 we can observe a more detailed analysis of the importance of each skill in each country. There is a very strong response tendency in PL between soft and hard skills. Soft skills are very important in all countries (blue line). All countries value them. Hard skills are valued only in the three countries on the left-down area: IDN, PL and RO.

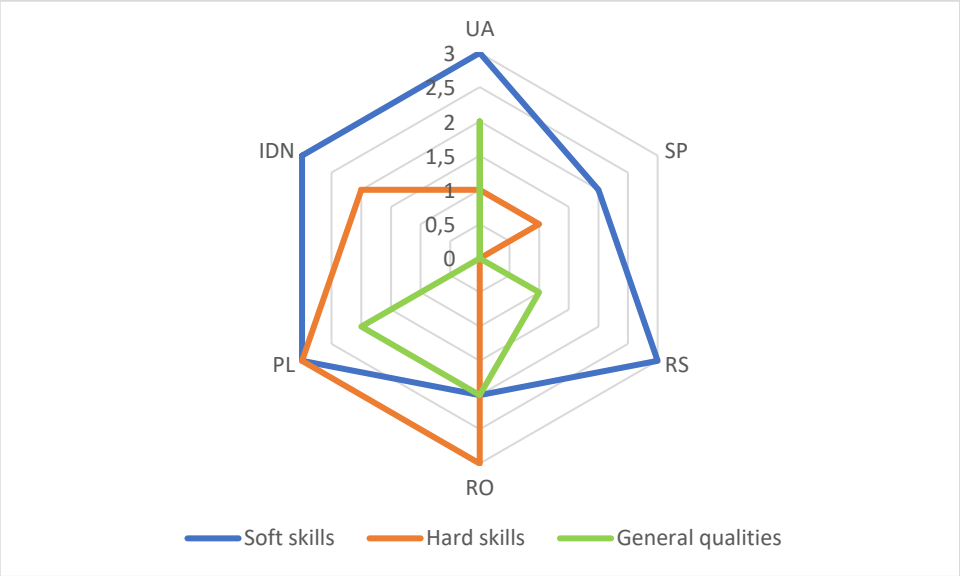


Figure 12. Star chart for most important skill type vs. country responses (freelancers' perspective).

An analysis focused on experience and the most important skill type shows that **soft skills and general qualities are more important for subjects with less than 10 years** of experience as a freelancer compared to those with more than 10 years of experience.

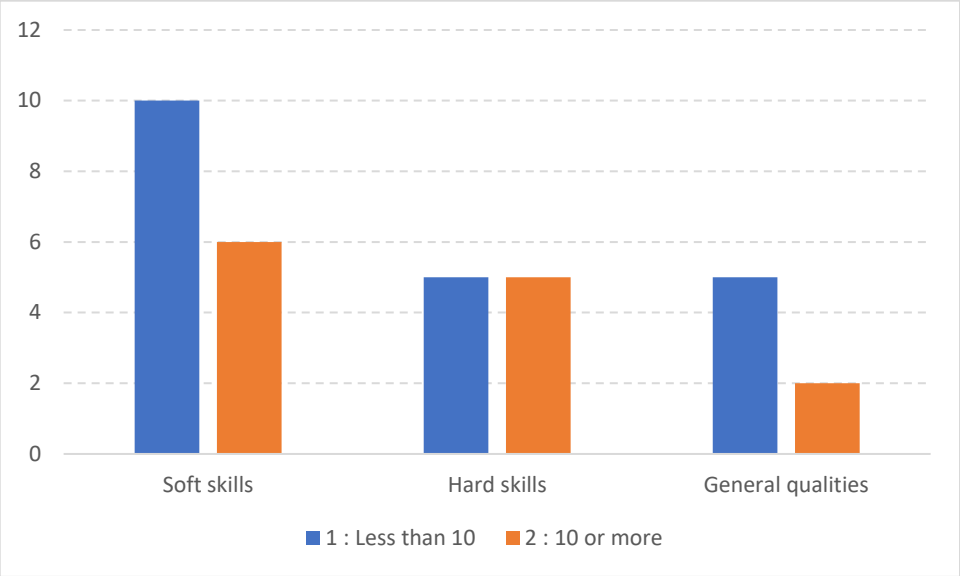


Figure 13. Skill type vs. experience as freelancer.

1.4.6 Associations responses vs. freelancers' classification variables

A correspondence analysis applied to the responses, as well as the participant's age and experience, shows a positioning map as in Figure 14, and some notable patterns emerge. There is a significant association (Chi-squared = 934.427, df = 100, p = 0.000), reflecting a pattern of responses toward communication with clients and colleagues (COMMS), abilities to keep good relationships (RELATNS), and teamwork among younger and less experienced freelancers. However, older and more experienced freelancers place more value on project management (PROJMGMT) and technical / technological competencies (TECCOMP). Knowledge of formal regulations, legal and other risks (KNWREGS), as well as personal attributes (PERSATRB), does not show a clear position on the map, which seems to indicate a disparity in responses among the different types of freelancers.

According to the identified dimensions:

- The horizontal axis (or dim. 1) can be interpreted as a "freelancer's experience gradient," ranging from inexperience to experience.

- The vertical axis (dim. 2) represents a contrast between "openness and communication with others" (top: focus on communication to others and

maintaining relationships) and "participant introspection" (bottom: focus on legal knowledge and personal attributes).

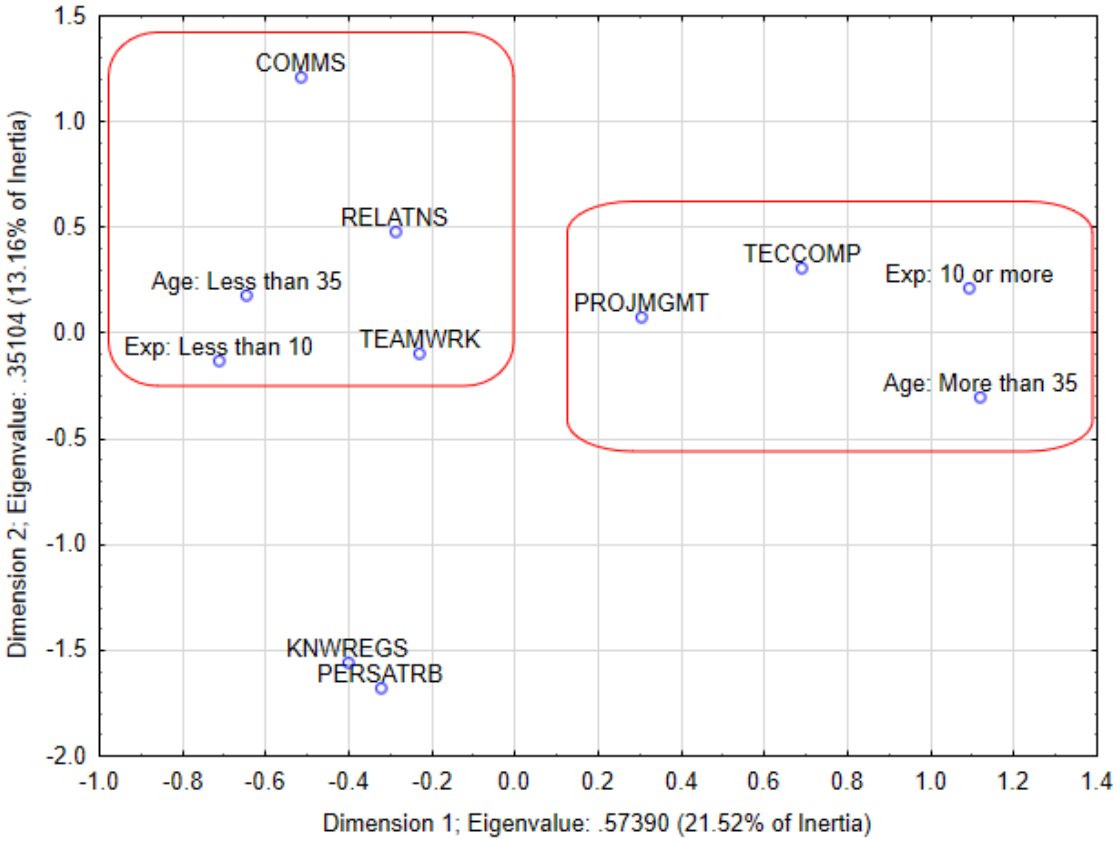


Figure 14. Positioning map. Responses vs. age and experience (freelancers).

The correspondence analysis map in Figure 15 illustrates the relative associations between different categories of competences and countries. The horizontal dimension appears to differentiate countries primarily based on emphasis on teamwork and technical competencies on the left, versus communication, project management, and legal knowledge on the right. The vertical dimension seems to separate attributes such as knowledge of regulations and maintaining relationships (in higher values) from teamwork and technical skills (in lower values).

While the overall Chi-square test did not reveal a statistically clear and significant association between countries and competency categories (Chi-squared = 26.28, df = 30, p = 0.660)[1], the map provides a nuanced visual insight into some tendencies:

- Poland and Spain appear moderately associated with attributes related to personal characteristics and relationship building,
- Romania is positioned closer to technical competencies and teamwork possibly suggesting a balanced emphasis on these areas,
- Indonesia, Serbia and Ukraine cluster more closely with communication, project management, and regulatory knowledge, albeit without strong separation.

[1] It is important to note that these patterns should be interpreted cautiously given the lack of statistical significance, which indicates that the distributions of competencies by countries are relatively homogeneous, in general. Nonetheless, the plot can identify country-specific tendencies that worth exploring in a more qualitative manner.

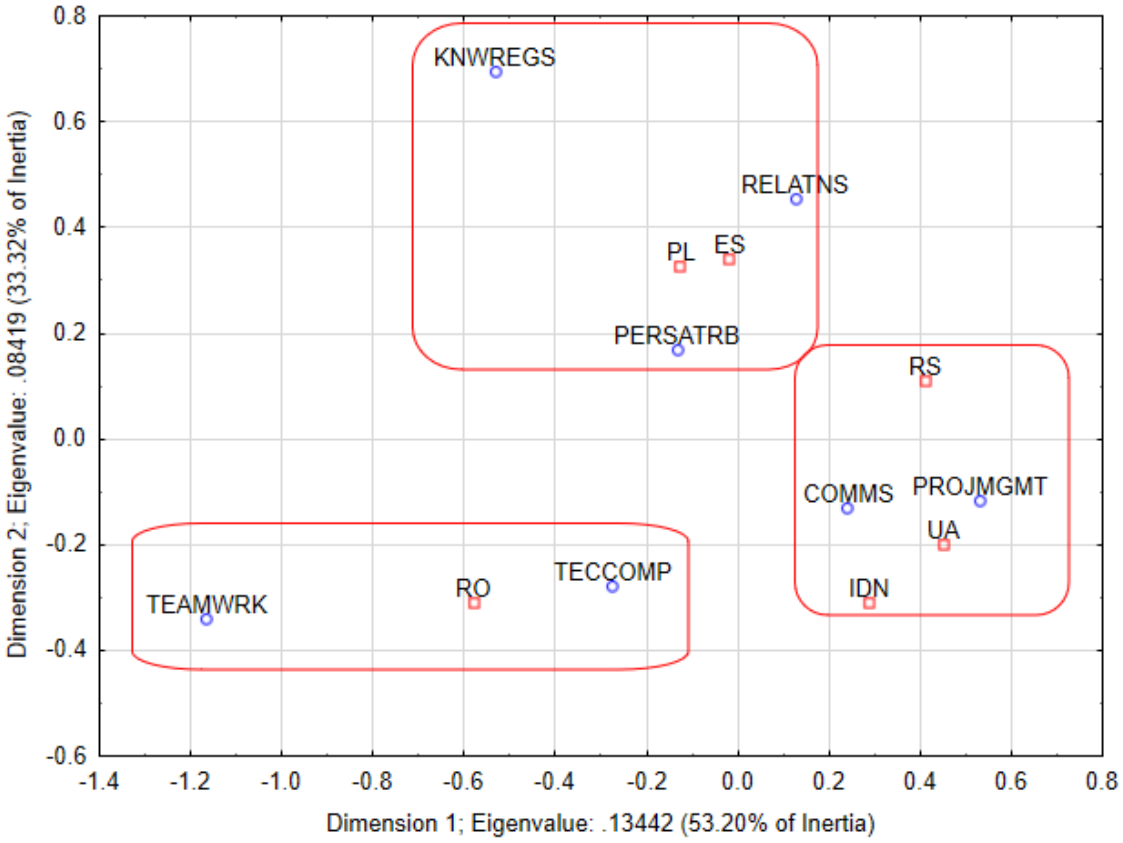


Figure 15. Positioning map. Responses vs. competences and country (freelancers).

1.4.7 How to keep the skills up to date or stay competitive in the freelance market

Freelancers across the study reported a wide range of strategies for staying competitive and keeping their skills up to date in a fast-evolving market (Table 16). One of the most common approaches was **continuous learning**, through courses, workshops, and self-guided study. Freelancers like [ES-VC], [ES-EM] and [IDN-NID] highlighted the importance of enrolling in online training programs, often on a weekly or ongoing basis. Others, like [PL-DS] and [PL-MJ], pursued formal education to deepen their expertise, sometimes across multiple fields of study. [RO-AT] and [UA-OC] also relied on professional upgrade courses and specialized reading materials to stay sharp.

Closely connected to this was the constant effort to stay informed **about trends and technology**. [IDN-NID] and [RO-RC] both mentioned regularly reading tech blogs and newsletters, while [UA-OS] and [UA-VP] track design trends and evolving client needs to adapt their services accordingly. [RO-RC] also described learning by

experimenting with small projects, a practice echoed by [RS-US] and [RS-AZ], who emphasized practical, hands-on learning.

Another major theme was exploring and **adapting to new tools and technologies**. Freelancers such as [IDN-LNA] and [ES-AS] pointed to the need to stay current with AI-based platforms, translation tools, and software updates, especially in digital and technical fields. [PL-JS] described how building websites and working with Adobe tools requires constant updating, while [PL-MJ] invests in new software and hardware to remain efficient.

Some freelancers emphasized that **experience itself is a form of growth**. [RO-AN], [RS-AZ] and [RS-US] explained that working on real projects was one of the best ways to improve, while [RS-VA] mentioned adapting skills directly based on what clients ask for. They also applied to new jobs to observe market trends and tailor their abilities accordingly.

Finally, several participants stressed the role of **networking and visibility** in staying relevant. [IDN-PA] and [IDN-NID] underlined the value of talking to others, sharing knowledge, and joining communities. [UA-OS] took this further by actively sharing project work, reviews, and updates on social media, which not only keeps their skills visible but also attracts clients and feedback. [UA-VP] agreed that connecting with other freelancers was a useful way to benchmark and reflect on one's own skills.

Main category	Method for staying updated and / or Competitive	Participant ID
Continuous learning	Taking online courses or workshops	[ES-EM], [ES-VC], [IDN-NID], [RO-AT], [UA-OC]
	Studying university degrees or formal education	[PL-DS], [PL-MJ]
	Reading tech news / industry blogs / journals	[IDN-NID], [RO-RC], [PL-JS]
	Following design trends and small business needs	[UA-OS], [UA-VP]
	Practicing and experimenting with new techniques	[RO-RC], [RS-US], [RS-AZ]
Exploring new tools and tech	Learning new tools and platforms (AI, CAT tools, SEO tools)	[ES-AS], [IDN-LNA], [IDN-NID], [PL-JS], [UA-VP]
	Investing in updated equipment and software	[PL-MJ], [PL-JS]
Learning by doing	Gaining experience through hands-on work and projects	[RO-AN], [RS-AZ], [RS-US], [UA-OC]
	Working on real client needs (adapting based on project demands)	[RS-VA]
	Applying to jobs to assess market expectations	[RS-VA]
Networking and visibility	Networking and exchanging knowledge or process with others	[IDN-NID], [IDN-PA], [UA-VP], [UA-OS]
	Joining communities and staying active in social networks	[IDN-PA], [UA-OS]

Table 16. How to keep the skills up to date or stay competitive.

In summary, staying competitive as a freelancer is a dynamic, ongoing process that combines continuous learning, technological curiosity, hands-on practice and strategic relationship building.

1.4.8 How the AI technology is changing the freelancer work

Across different disciplines, freelancers are experiencing a significant shift in their work due to the rise of AI technology (Table 17). For some, the change has been nothing short of **transformative**. [ES-AS] described AI as a "brutal" change, comparing it to putting on an *Ironman* suit, offering enhanced capabilities but also requiring more effort to manage the additional responsibilities. Similarly, freelancers like [PL-JS], [RO-RC], and [UA-OS] reported that AI tools like ChatGPT, Copilot, or image-generation platforms have **boosted their productivity**, accelerated processes and enabled them to complete tasks faster or better.

Several freelancers in creative fields praised AI as a source of **inspiration and efficiency**. [UA-VP] mentioned how AI helped turn old poems into songs and assisted with video voiceovers using license-free tracks. Others, like [PL-MJ] and [RS-AZ], noted how AI enhances editing workflows or generates visuals based on simple text prompts, although some limitations still exist, such as output quality or licensing restrictions.

Several participants emphasized how AI has made their work **easier or more manageable**. [IDN-PA] shared how it helps prepare scripts for events, and [RS-VA] explained how it supports content ideation and research for blogs. [UA-OC] highlighted its role in quickly delivering needed information, while [PL-DS] appreciated how AI can dramatically reduce time spent on data analysis, assuming the user is trained to use it properly.

Not everyone, however, is using AI daily or feeling a direct impact, yet. [IDN-NID] admitted that while AI has not changed their workflow significantly so far, it is clearly something to watch. [ES-EM] added a cautionary note, emphasizing that AI is only effective when the user knows what they are doing. Without a solid understanding, it can generate misleading or inaccurate information.

Some participants took a more **critical or cautious view**. [RS-US], for example, said AI has made it harder to find freelance jobs in certain tech-heavy areas, since automation has become more capable. [PL-MJ] also noted concerns about free or limited versions of creative AI tools, which can reduce the quality of deliverables if not properly managed.

Main Category	How AI is changing freelance work	Participant ID
Very positive / transformative	AI is "brutal" ~~and gives superhero-like power~~, increases productivity despite requiring more hours	[ES-AS]
	Game-changer in web and graphic design; speeds up work, adds new creative capabilities	[PL-JS], [PL-MJ]
	A powerful assistant in design; helps generate content, prototypes, ideas	[UA-OS], [UA-VP]
	Highly valuable for development, helps with code generation (for ex. Copilot, ChatGPT), saves time	[RO-RC], [RO-AT]
	Strong positive shift in translation workflow, though financial downsides exist	[IDN-LNA]
	Exciting potential in public tender analysis and complex tasks, even if not yet fully realized	[RO-AN]
Helpful / useful	Makes tasks easier (scripts, admin, content), saves mental effort and time	[IDN-PA], [RS-VA], [UA-OC]
	Helps generate ideas, blog posts, content drafts, and reference research	[RS-VA], [UA-VP]
	Simplifies editing and visualization in creative work	[RS-AZ]
	Used in data analysis, creative tasks, supports development through short-term experiments	[PL-DS]
Neutral / aware of change	Hasn't changed workflow yet, but there's awareness of future impact	[IDN-NID]
	AI is only helpful if used with proper understanding; lacks reliability when misused	[ES-EM]
Critical / cautious	Raises competition and reduces job availability in programming-heavy fields	[RS-US]
	Quality and licensing concerns remain when using free or limited AI tools	[PL-MJ]

Table 17. How the AI technology is changing the freelancer work.

In summary, most freelancers recognize that AI is **reshaping their professions**, often for the better, that is, enhancing creativity, increasing speed, or opening new

possibilities. At the same time, there is a shared awareness of its limitations and a clear understanding that, even in an AI-assisted world, human skill, critical thinking and judgment remain irreplaceable. In this question, as expected, we can observe more positive than negative responses. Neutral responses and a mix of both valences are also observed (Figure 16).

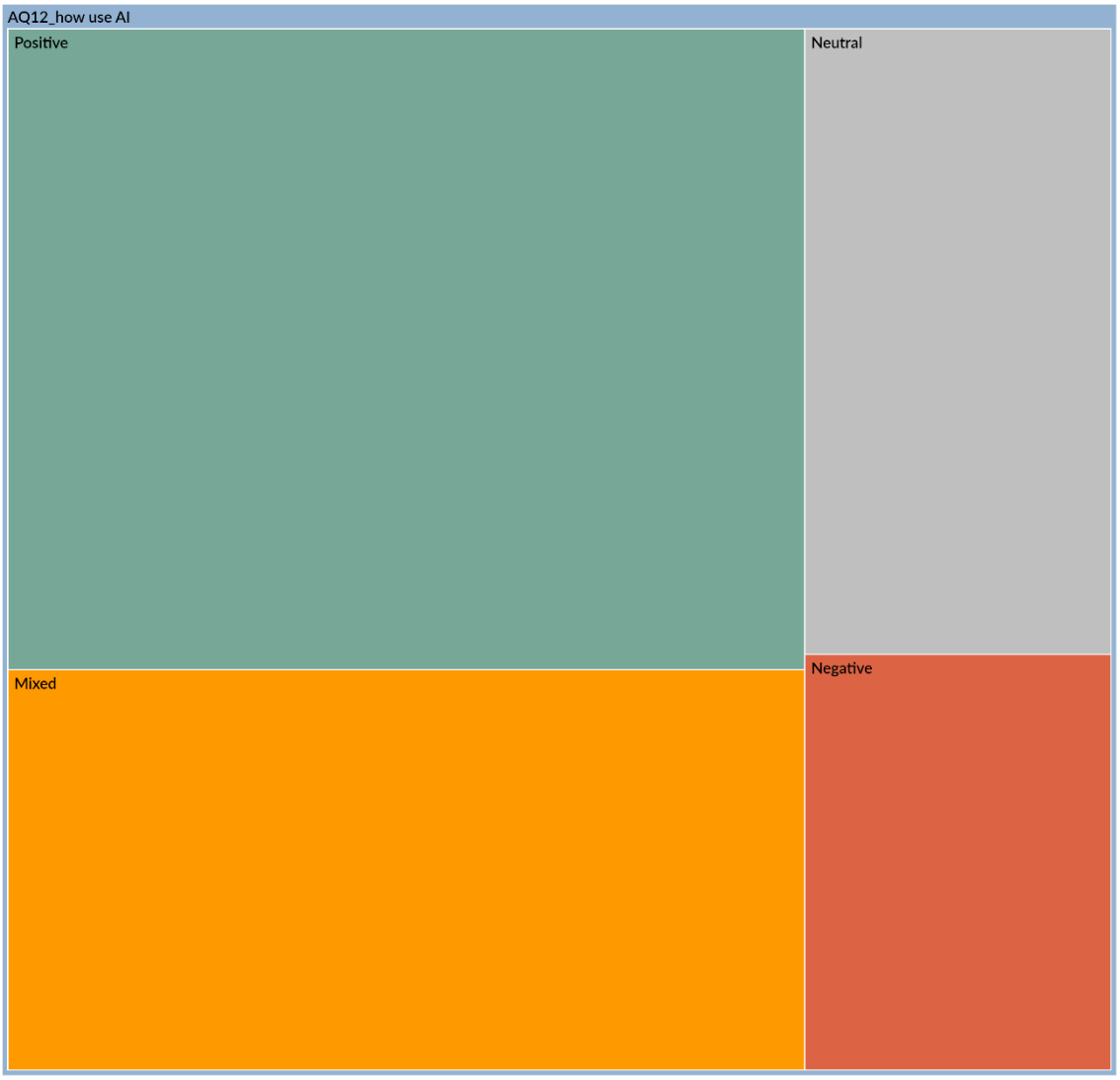


Figure 16. Rectangle map for the valence of responses to the use of AI.

1.4.9 Biggest challenges or risks you face as a freelancer

Freelancers around the world face a variety of challenges and risks linked to rapid market **changes and broader economic shifts that could reduce demand or replace them** (Table 18). [IDN-NID] and [RS-US] emphasized the growing competition

in freelance marketplaces, often driven by lower rates and a global talent pool. [PL-MJ] described the emotional and financial strain of leaving a stable job, echoing the anxiety many feel when choosing freelancing as a full-time path. [ES-VC] pointed out the fear of suddenly losing clients, while [RO-RC] shared a personal experience where a project was cancelled without notice (also client-related risk), illustrating how freelancers are often the first dismissed in downturns.

According to financial & income uncertainty, a common concern is the unpredictable flow of income. [IDN-PA], [IDN-LNA], and [PL-JS] all mentioned experiences with delayed or missing payments, which add to fears of losing income. [RS-AZ] described the early months as especially difficult, marked by uncertainty and lack of steady income, showing how hard it can be to secure consistent earnings despite fluctuating demand.

Another major challenge is **client-related misunderstandings**. Client-related misunderstandings and risks tied to expectations, legal issues, or sudden contract changes are another major concern. [ES-EM] expressed frustration at working with clients who lack knowledge about digital marketing, making communication and project alignment difficult. [UA-OS] noted that small business clients sometimes fail to see the value of design work or want to cut costs in crucial areas, which can undermine both quality and sustainability. [RO-AN] warned about the potential legal consequences freelancers might bring to a company, especially when working on high-impact projects without clear contracts or compliance understanding.

Balancing demands versus fair compensation and handling complex project coordination also present challenges. [RS-VA] spoke of the difficulty in managing work across different time zones, highlighting how operational hurdles can complicate project delivery (**Operational & workload management**).

The impact of technology adds another layer of pressure. [IDN-PA] noted that clients are increasingly able to perform tasks themselves using AI tools, raising concerns about being replaced or devalued. Similarly, [ES-AS] and others highlighted the need to constantly learn and adapt to a fast-changing technological landscape just to stay competitive.

Beyond external pressures, freelancers also grapple with personal challenges that test their **mental resilience, discipline, and long-term focus**. [PL-DS] stressed that success in freelancing starts with inner motivation, goal setting, and the ability to maintain focus. Meanwhile, [UA-VP] admitted that perfectionism and getting caught in too many details can delay delivery, despite a strong commitment to quality.

Main category	Challenge / risk description	Participant ID
Market & economic uncertainty	Rapid market change and need to adapt quickly	[ES-AS], [PL-MJ]
	High competition, low rates, job insecurity	[IDN-NID], [RS-US]
	Freelancers often dismissed first in economic downturns	[RO-RC]
	Fear of losing income sources overnight	[ES-VC]
	Instability of client flow, gaps between projects	[UA-OS], [RO-RC]
	Challenge of balancing client demands and compensation	[RO-AT]
	Legal and compliance risks in company contracts	[RO-AN]
Financial & income uncertainty	Lack of financial stability or income continuity	[PL-MJ], [RO-RC], [RS-AZ]
	Late or missed payments	[IDN-LNA], [IDN-PA], [PL-JS]
Client-related risks	Clients lack training or understanding	[ES-EM], [UA-OS]
	Client dissatisfaction or unmet expectations	[RO-AN], [UA-VP]
	Communication challenges or undervaluing of work	[UA-OS]
	Risk of project termination or sudden contract ending	[RO-RC]
Operational & workload management	Time zone coordination in remote work	[RS-VA]
	Technical challenge in complex client requests	[UA-VP]

Main category	Challenge / risk description	Participant ID
Technological & skills pressures	Risk of being replaced by technology or client self-sufficiency	[IDN-PA]
	Need to adapt to fast-paced tech developments	[IDN-PA], [ES-AS]
Personal & psychological factors	Need for mental strength, discipline, long-term focus	[PL-DS], [PL-MJ]
	Difficulty starting out (no consistent income at first)	[RS-AZ]
	Struggles with perfectionism or over-detailing tasks	[UA-VP]

Table 18. Biggest challenges or risks faced by freelancers.

Overall, the responses reveal that freelancing requires far more than technical skill. It demands a high level of adaptability, emotional resilience, business awareness and constant learning in the face of an ever-shifting market.

1.4.10 Motives to continue freelancing instead of seeking full-time employment

A clear and recurring theme among freelancers is the value they place on **flexibility and autonomy** (Table 21). Many emphasized the ability to set their own schedule, work from anywhere, and adapt their professional lives to personal needs. For instance, [ES-AS] shared how freelancing allows them to care for their child without needing to ask for permission, while [IDN-LNA], a stay-at-home mom, pointed out that freelancing is the only way to balance work and family. Others, like [ES-VC], [RS-VA] and [UA-OC], simply appreciated being able to work remotely, organize their days freely, or even work from the beach. For some, like [RS-AZ], it is about avoiding the rigidity of a 9-to-5 job altogether: “I like to be a free man,” he stated simply.

Furthermore, the desire for **control and independence** emerged as a strong factor related with the previous one. Freelancers like [RO-RC] and [ES-EM] appreciated being able to choose their clients, change projects, and negotiate their own terms. [RO-AN] added that freelancers can engage with multiple companies without the bureaucracy of formal employment, a particularly appealing aspect in highly regulated labour markets.

Professional growth and variety were also strong motivators. Freelancers like [PL-JS] and [RO-AT] noted that each project brings new challenges and opportunities to learn. [IDN-NID] shared that freelancing has allowed them to pivot into a new career field different from their academic background, using projects to build experience and credibility. For [UA-VP], who also teaches computer science, freelancing fuels creativity and is inspired by interactions with students.

For others, the **motivation is primarily financial**. [RO-AN] explained that Romania's tax system favours freelancers with significantly lower contributions compared to employees, making freelance work financially attractive. Similarly, [PL-DS] mentioned building a parallel path with freelance consulting, seeing it as a viable alternative to traditional employment.

A few freelancers adopt a **hybrid or fallback strategy**. [PL-MJ], for instance, is open to full-time opportunities, especially in high-profile sectors like automotive branding, but still sees freelancing as a stable "Plan B" given the equipment and skills already acquired. [IDN-PA] and [RS-US] also acknowledged considering full-time roles while continuing freelance work for flexibility and financial backup.

And some freelancers continue because of the **enjoyment and fulfilment** they derive from the work itself. [IDN-PA] expressed that even while actively seeking full-time employment, they continue freelancing simply because it brings joy, saying "why not do what you enjoy and get paid for it?"

Main category	Freelance motivation	Participant ID
Flexibility, autonomy, independence	Freedom to choose schedule, work remotely and balance personal life	[ES-AS], [ES-VC], [IDN-LNA], [IDN-NID], [RO-RC], [RS-US], [RS-VA], [UA-OC], [UA-OS]
	Avoiding rigid structures like 9-to-5 jobs	[RS-AZ]
	The option of working with multiple clients, choose projects and change when desired	[RO-RC], [ES-EM]
	No need to explain job transitions or face hiring constraints	[RO-AN]

Main category	Freelance motivation	Participant ID
Professional growth & variety	Each client/project brings new challenges and learning opportunities	[PL-JS], [RO-AT], [UA-OS], [UA-VP]
	Chance to develop a diverse portfolio and gain experience in a new field	[IDN-NID]
Financial reasons	Preferential tax system or higher net income through freelancing	[RO-AN]
	Opportunity to build parallel income stream with consulting	[PL-DS]
Hybrid/fallback strategy	Freelancing is a plan B or complement to potential full-time offers	[PL-MJ]
	Still considering full-time employment but maintaining freelance work	[IDN-PA], [RS-US]
Enjoyment & passion	Freelance work brings happiness and enjoyment	[IDN-PA]

Table 19. Reasons to continue freelancing.

In sum, whether for freedom, growth, financial benefit, or personal satisfaction, freelancers across countries share a common appreciation for the agency and diversity that freelance life provides, despite its inherent challenges.

The next **word cloud of the most frequently** used terms used to describe **reasons for continuing to work as a freelancer** appears in Figure 17. The words that appear together the most often in the same response are shown in orange.

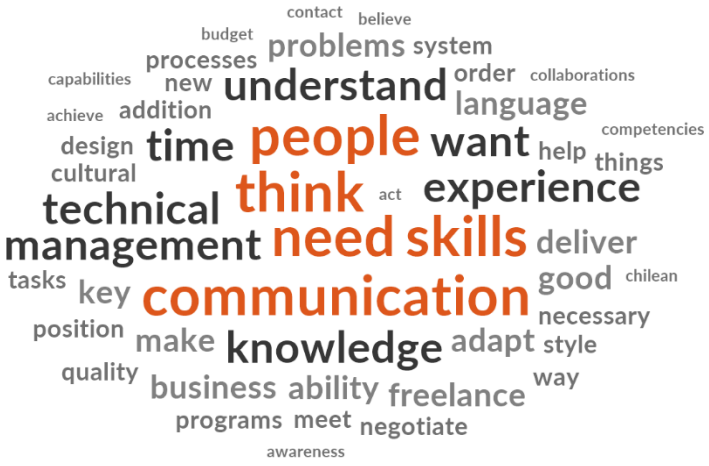


Figure 17. Word cloud for the reasons to continue freelancing.

1.4.11 How has your experience as a freelancer evolved over time?

Freelancers from various backgrounds shared how their journey has evolved, often shaped by personal growth, market dynamics and the development of new skills (Table 20). A major theme that emerged was **professional and personal growth**, where many participants described how they have become more confident and skilled over time. [IDN-LNA] highlighted improvements in both translation techniques and time management, which made them feel more secure in handling larger projects. Similarly, [UA-OS] emphasized not only gaining confidence, but also the ability to better understand client needs, filter project requests and prioritize both financial and emotional satisfaction at work. [RS-VA] described a clear shift from taking short-term jobs just for reviews to forming long-term partnerships and choosing projects that truly aligned with their interests. Meanwhile, [UA-VP] mentioned how their technical evolution, through upgrading equipment and expanding software skills, has opened new possibilities in their freelance work.

In terms of **project and client evolution**, some freelancers experienced a transition from taking on anything available to becoming more selective. [PL-JS] noted that, initially, every opportunity felt like it had to be seized, but with experience came efficiency and a more strategic mindset, that is, reusing and adapting previous work, rather than starting from scratch. [RO-RC] offered a more volatile perspective, describing how the stability of initial clients gave way to uncertainty during market

shifts, requiring adaptability and financial preparedness. However, they also pointed out a return to a more secure position with their current client, allowing them to regain focus and confidence in their freelance journey.

For others, the journey was more about **resilience and adaptability**. [IDN-PA] emphasized the importance of learning from mistakes, reflecting on their growth through self-evaluation and avoiding repeated errors. [ES-VC] acknowledged the challenge of adapting early on but eventually learned to value flexibility and master self-organization. [RS-US] shared how communication and handling client relations have become smoother over time, while [RS-AZ] simply observed a steady increase in workload and client base compared to their early days.

Finally, several freelancers described **steady or linear trajectories**, especially those in long-term arrangements. [RO-AT] mentioned working for stable clients for over five years, with little volatility, while [RO-AN] described a consistent professional path, marked by satisfaction in completing major projects and maintaining leadership roles. For [ES-AS], the evolution came not just in handling work itself, but in mastering financial planning and client guidance, helping clients avoid critical mistakes and adding strategic value to the relationship.

Main category	Evolution description	Participant ID
Skill growth & confidence	Improved skills, processes and financial planning	[ES-AS]
	Personal and professional growth from early challenges	[ES-EM]
	Development of translation and time management skills	[IDN-LNA]
	Gained skills and learned from each project	[IDN-NID]
	Avoiding repeated mistakes through self-reflection	[IDN-PA]
	Greater efficiency, reuse of experience and awareness of tech tools	[PL-JS]
	Improved professionalism and communication with clients	[RS-US]
	More confidence and understanding of client needs	[UA-OS]
	Broader software use and equipment investment	[UA-VP]
Client base & workflow stability	From short-term reviews to long-term partnerships	[RS-VA]
	Now works mostly with regular clients	[UA-OC]
	Linear progression through ongoing contracts	[RO-AN]
	Consistent clients over long periods	[RO-AT]
	Evolving through different clients and project demands	[RO-RC]
	Expanded client base and workload	[RS-AZ]
Personal mindset & adaptation	Adapting to freelance lifestyle and learning to self-organize	[ES-VC]
	Shifting mindset from scarcity to strategy	[PL-JS]
	Navigated through market downturns and learned to prioritize comfort over income	[RO-RC]

Table 20. Evolution of freelancers' experience.

Altogether, these narratives reflect a diverse but interconnected journey. Whether through skill development, shifting project types, or adapting to economic and personal challenges, freelancers are continuously evolving, becoming more strategic, resilient and intentional in shaping their careers.

1.4.12 Have you noticed an increase in demand for your freelance services in recent years?

In recent years, freelancers have seen the market shift in all kinds of ways, some have felt a real surge in demand, while others are finding it harder to stand out (Table 21).

Several participants shared that things have **definitely picked up**. [RS-AZ], for example, mentioned that their workload and client base have grown steadily over time, helped by stronger relationships and more experience. [UA-OS] echoed that, saying more small businesses are reaching out for quality design work, especially now that having an online presence is key. Even [RS-US] noted that, surprisingly, AI has opened new doors and brought fresh opportunities, despite its disruptive reputation.

Others, however, spoke of a **more mixed picture**. [RO-AT] explained that although they have not explored the wider market much, demand from their main client has increased, largely because the company itself is expanding. [PL-MJ] pointed out that video marketing is booming, but also warned that competition is fierce, saying you really have to deliver high-quality work to stay ahead. [PL-JS] added that while tools like Canva and AI are changing the game in design, there's still plenty of demand out there, especially online.

On the flip side, some freelancers said that demand feels like it is **shrinking or at least changing shape**. [IDN-LNA] noticed that clients are now more interested in having AI-generated translations edited, rather than paying for full manual ones. [IDN-NID] and [IDN-PA] both shared concerns about how automation, and the flood of freelancers offering lower rates, has affected job opportunities. [UA-VP], reflecting on the situation in Ukraine, said demand has shifted in unpredictable ways, sometimes bringing surprising chances for creative work, but also new kinds of instability.

And then there were those who feel the market has actually **gotten tougher**. [ES-AS] and [ES-EM] both said they are finding it harder to land clients, with [ES-AS] calling the market "saturated." [RO-RC] added that while things might be improving slowly, it is still a tough time, especially for newcomers trying to jump in. [IDN-PA] pointed out that even having years of experience doesn't guarantee work, as clients often look for cheaper options.

Trend category	Observation	Participant ID
Increased demand	Yes, more work from agencies and direct clients	[ES-VC]
	High workload and expanding client base	[RS-AZ]
	Steady growth through referrals and continuity	[PL-DS]
	More visibility due to AI tools	[RS-US]
	More jobs being posted, especially in year two	[RS-VA]
	Higher demand from small businesses needing design and digital presence	[UA-OS]
	Yes	[UA-OC]
	Video marketing is increasingly in demand, but very competitive	[PL-MJ]
	Client requests increased due to business expansion	[RO-AT]
Mixed or shifted demand	More work but shifted from full manual translation to MTPE	[IDN-LNA]
	AI has changed the type of work in graphic design; demand still exists	[PL-JS]
	Changes due to crisis in Ukraine, some tasks disappeared while others emerged	[UA-VP]
No increase / decline	Market is more saturated and competitive; harder to find clients	[ES-AS]
	Increased competition reduces opportunities	[ES-EM]
	Decline due to automation and AI adoption	[IDN-NID]
	No increase noticed, many with similar skills offer lower rates	[IDN-PA]
	No market exploration, only current stable client	[RO-AT]
	Current client stable, but market seems tougher than before	[RO-RC]

Trend category	Observation	Participant ID
	Continuing with similar technical consultancy tasks, no notable change	[RO-AN]

Table 21. Freelancers' demand trend.

In general, freelancers seem to be navigating a constantly changing landscape. For some, it is growth and new possibilities; for others, it is more uncertainty. But one thing is clear: maintaining flexibility, learning to adapt, and knowing how to position yourself are more important than ever.

1.4.13 Working with global vs. local clients: perceptions of differences

Freelancers had plenty to say when asked about their experiences working with international versus local clients. For many, the difference was quite noticeable (Table 22).

Some explained that **global clients tend to operate in a more structured and professional way**. [ES-EM], for example, mentioned that large companies usually respect your role more, making it easier to work and communicate with them. [UA-VP] also shared that while these projects can come with stricter deadlines and higher expectations, they often feel more rewarding and help you grow professionally. [RS-US] and [PL-JS] agreed, pointing out that international clients are usually more generous with their budgets and trust freelancers more to manage their own time and tasks.

Still, not everything is easier when working globally. [ES-VC] and [UA-VP] pointed out that larger companies also **expect a higher level of service**. You might need to be available more often, respond quickly, and stay on top of every detail. Others, like [IDN-LNA], talked about having to adapt to different cultures and tools. Translating for international clients, for instance, often involves using specific software (like CAT tools) and making sure content makes sense in different cultural contexts.

Money was another big topic. Several freelancers, including [ES-AS], [RO-RC] and [RS-AZ], noticed that international clients tend to offer better pay and take freelance

work more seriously. [PL-JS] even mentioned working with big names like Lufthansa and Honda, saying those jobs paid much better than average and were worth the effort.

Finally, a few freelancers reflected on the freelance lifestyle itself. [ES-AS] and [RO-AN] emphasized that one of the perks of freelancing (especially with international clients) is the **freedom to set your own hours and decide which contracts to accept**. But that freedom also comes with uncertainty. As [ES-AS] pointed out, a project with a large company can end suddenly if there is a shift in management, whereas small businesses might depend on a freelancer more consistently.

Not all freelancers noticed big differences. Some (like [RS-VA]) have done little or no work with international clients, so they **do not have much to compare**. Others, such as [IDN-NID], felt that local and global projects were more or less the same in terms of how people communicated or what kind of tasks were assigned. A few, including [RO-AT], [PL-DS], [PL-MJ] and [UA-OS], **have not worked internationally yet**, although [UA-OS] mentioned they are eager to gain that kind of experience to broaden their skills and portfolio.

Main category	Observed difference	Participant ID
Higher professional standards, more demanding & complex	Global clients show more professionalism, clearer communication and defined responsibilities	[ES-EM], [UA-VP], [RS-US], [PL-JS]
	Global clients are more disciplined with time and processes	[RS-AZ], [IDN-PA]
	Work with international clients requires more flexibility and adaptability	[UA-OC], [IDN-LNA]
	Larger/global clients have higher expectations and require more dedication and time	[ES-VC], [UA-VP], [PL-MJ]
	Larger clients offer higher budgets and expect higher quality	[ES-VC]
Better pay & value recognition	International clients pay more or value freelance services better	[ES-AS], [RO-RC], [RS-US], [PL-JS]

Main category	Observed difference	Participant ID
Cultural & technical differences	Global projects involve different technologies or cultural understanding	[IDN-LNA], [IDN-PA]
Freelance scope & autonomy	Global clients may end contracts easily; local clients rely more heavily on the freelancer	[ES-AS], [RO-AN]
	Freelancer controls their schedule and contract scope	[RO-AN]
No notable difference / no experience	Experience was similar across both client types or limited to international work only	[IDN-NID], [RS-VA], [PL-MJ], [RO-AT], [PL-DS], [UA-OS]

Table 22. Freelancers' reflection on work with global or local clients.

Overall, the stories shared paint a complex picture: working with international clients often entails higher salaries and greater professionalism, but also more pressure and the need to constantly adapt. For those willing to take on this challenge, it can be an exciting and rewarding path.

1.4.14 Final sentiment analysis

The sentiment analysis provides an overview of the emotional tone of the participants' responses (Prodavona et al., 2025)

Based on a group of four questions related to: (1) how to stay competitive in the sector, (2) the biggest challenges/risks, (3) motivations to continue as freelancers instead of a full-time employee, and (4) how the experience as freelancer was over time, **to reach a critical mass of responses, we conducted a sentiment analysis**. The results appear in Figure 18 and Figure 19.

Assuming that we have 12 responses in total for each of these questions (3 participants answered each question), it is very significant that **Serbia shows only 1 positive responses**, and the rest is neutral, neither positive nor negative (this category not included in this analysis). **Ukraine has more responses with positive valence** (moderately or very, in green), and **Poland's responses are more negative** (more negative responses (moderately or very, in red, and orange, respectively).

Country	Very negative	Moderately negative	Moderately positive	Very positive
UA	2	0	4	3
SP	2	1	3	3
RS	0	0	0	1
RO	3	5	9	3
PL	2	6	6	1
IDN	2	3	4	4

Figure 18. Freelancers - Sentiment analysis by country (table).

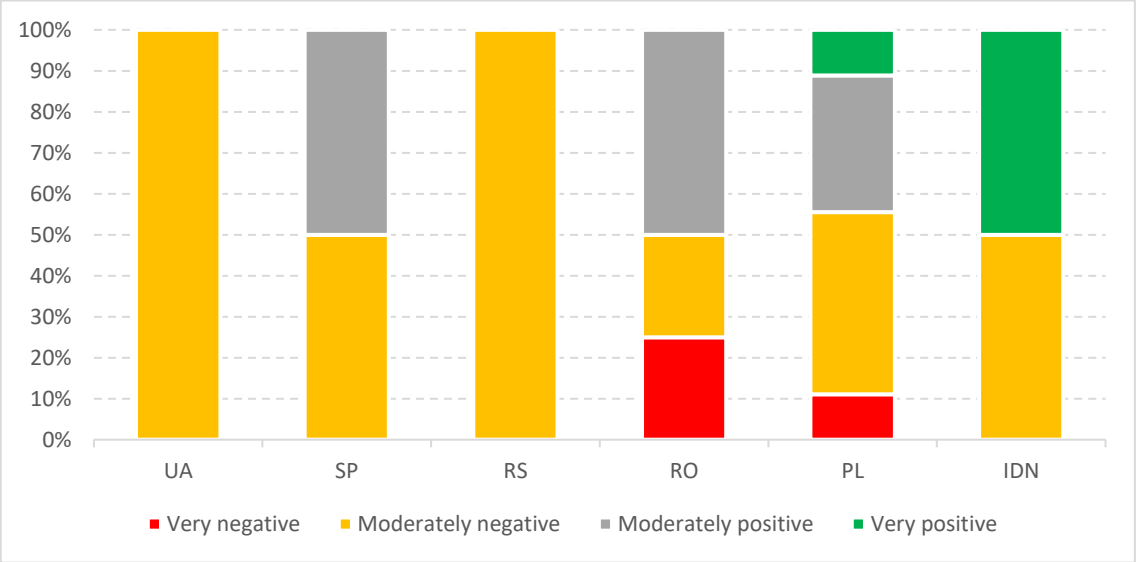


Figure 19. Companies - Sentiment analysis by country.

1.4.15 Summary

The services offered by the freelancers surveyed reflect a **considerable diversity**, although certain areas appear more frequently than others. There is a representation of these major areas: “Business, management and consulting”, “Technology, development, and media production”, “Content, communication & language” and “Other/support and personal services”.

In particular, content and communication dominate in Indonesia. Tech/media production is strong in Poland, Serbia, and Ukraine. Business and consulting are key

area in Romania and Spain. Other support services are rare, only Indonesia shows activity here.

Overall, freelance work proves to be an asset for many companies, whether integrated regularly into their operations or used occasionally for specific or additional tasks. The way businesses approach freelance hiring tends to vary based on factors like company size, project scope, and the specific expertise required. Some maintain ongoing relationships with freelancers, while others engage them only when a particular need arises. The main areas for hiring freelancers were web design, software development, technical writing, audiovisual production, graphic design, and training/workshops, reflecting how companies leverage freelancers for specialized or non-core task.

Based on communication channels, freelancers reported using a wide variety of channels such as freelance platforms, professional job portals, social media, WOM/referrals, and industry-specific environments (e.g., conferences, coworking spaces). Participating in specialized bidding platforms or AI-focused communities can also increase visibility. But the most important thing is building relationships across these channels.

According to the skills offered by freelancers, they are grouped into main four broad areas: technical skills, communication, personal attributes, and abilities to foster trusting relationships with clients through empathy, reliability, and consistent quality. Thirty percent of respondents highlighted technical skills (ranging from programming languages and data tools to multilingual design and marketing software) as vital for securing and delivering freelance work. Communication emerged with almost equal prominence, underscoring the need to express ideas clearly, maintain transparent interactions with clients, and adapt the style to diverse expectations. Personal qualities such as proactivity, initiative, discipline, resilience, and a strong work ethic were widely valued, especially for navigating the autonomy and uncertainty of freelance careers

According to the skills offered by freelancers, they are grouped into main four broad areas: technical skills, communication, personal attributes, and abilities to foster trusting relationships with clients through empathy, reliability, and consistent quality.

Thirty percent of respondents highlighted technical skills (ranging from programming languages and data tools to multilingual design and marketing software) as vital for securing and delivering freelance work. Communication emerged with almost equal prominence, underscoring the need to express ideas clearly, maintain transparent interactions with clients, and adapt the style to diverse expectations. Personal qualities such as proactivity, initiative, discipline, resilience, and a strong work ethic were widely valued, especially for navigating the autonomy and uncertainty of freelance careers.

Then, effective time management as a part of project management and organizational skills were also highlighted as essential for managing simultaneous projects across different time zones. Beyond this, freelancers recognized the importance of teamwork on collaborative projects, or the understanding legal and contractual frameworks in regulated industries. Skills, such as, independence, digital fluency, self-motivation, self-learning or continuous development are particularly valued, especially in dynamic or global contexts. Conversely, freelancers often face challenges around time management and communication. In line with the work of Lehdonvirta (2018), we highlight the importance of time management, adaptability and communication with the client as critical skills in the gig economy.

Staying competitive as a freelancer is a dynamic and ongoing process that combines continuous learning, technological curiosity, practice, and strategic relationship building.

All in all, most freelancers agree that AI is changing the way they work, and in many cases, it is a good thing. It helps speed things up, sparks creativity, and opens new ways of doing things. Still, most also point out that AI has its limits. You still need real human thinking, judgment, and skill to do the job well. As expected, most of the answers leaned toward the positive side, although there were also some more neutral takes or a bit of both.

The correspondence analyses applied suggest that older and more experienced freelancers value project management and technical/technological skills more. However, they show a pattern of responses regarding communication with clients and

colleagues, the ability to maintain good relationships, and teamwork among younger and less experienced freelancers.

According to the challenges or risks, what really comes through in these responses is that freelancing today is about much more than just knowing your tools. You need to be flexible, emotionally strong, business-savvy, and ready to keep learning as the market keeps shifting.

On the other hand, freedom, growth, financial benefit, and personal satisfaction are common reasons to continue freelancing; all of them reflect a shared appreciation for the autonomy and diversity that this way of working brings, despite its challenges.

Freelancers described how their careers have evolved over time, often growing in confidence, skills, and the ability to choose better-suited projects. Many shared that they have become more strategic, learning from experience, improving organization, and focusing on long-term relationships rather than just taking any job. Some mentioned facing ups and downs due to market shifts, while others spoke about steady paths shaped by consistent clients or leadership roles. Technical growth and better financial planning also emerged as key parts of that evolution. In general, their journeys reflect a mix of personal growth, resilience, and a stronger sense of direction.

Overall, freelancers seem to be navigating a landscape that is constantly shifting. For some, there is growth and new possibilities, for others, more uncertainty. But one thing is clear: staying flexible, learning to adapt and knowing how to position yourself are more important than ever.

Finally, the experiences shared reflect a nuanced reality, collaborating with international clients usually means better pay and more professional setups, but it also brings extra pressure and requires freelancers to stay flexible. Still, for those open to the challenge, it can be a fulfilling and dynamic direction to take.

2 Survey Among Freelancers and Companies Representatives

2.1 Objectives and research questions

To obtain a comprehensive picture of freelancer competences, the qualitative research described in the first chapter was followed by a extensive quantitative research which main goal was to answer the following research questions:

RQ1: What are the key competences (skills, knowledge, attitudes, and experience) required of freelancers, and to what extent are these competencies possessed by them across different sectors and countries?

RQ2: How do freelancers and hiring companies perceive skill gaps and competence mismatches in the freelance economy?

RQ3: (adapted for data analysis purpose): How can freelancers' training needs be determined, aligned with their professional development goals?

2.2 Methodology

The methodological guideline provides a harmonized analytical framework for all national research teams engaged in the ENTEEF project. The guideline builds upon the methods defined in the WP3-A1 Research Framework and ensures consistency, comparability, and replicability across countries.

The Lucian Blaga University of Sibiu team conducted the quantitative analysis of each national dataset collected through the *Questionnaire for Freelancers* and the *Questionnaire for Companies*. All national teams apply the same statistical design, coding conventions, and reporting structure to enable national-level interpretation and cross-country synthesis.

Each country team interpreted the results presented in its national data analysis and prepared a national analysis report using the standardized ENTEEF Word template. Data preparation, coding, statistical testing, and result interpretation were conducted in accordance with the guidelines described in WP3-A1 Research Framework.

All teams use this shared methodology to:

- Analyze national datasets independently (companies + freelancers).
- Produce comparable national summaries.
- Report standardized outputs suitable for cross-country aggregation.

National reports are included in annexes.

The surveys were conducted by in six partner countries (Indonesia, Poland, Romania, Serbia, Spain, Ukraine) between September 2025 and November 2025. Table 23 presents the number of respondents gathered by each ENTEEF national team.

Country	**No of freelancers**	**No of company representatives**	**Total**
Poland	165	4	**169**
Romania	108	8	**116**
Spain	171	5	**176**
Indonesia	82	8	**90**
Serbia	164	11	**175**
Ukraine	130	6	**136**
Total	**820**	**42**	**862**

Table 23. Respondent structure.

2.3 Respondent profile

2.3.1 Overview

The descriptive profiling of freelancers establishes the analytical baseline for the ENTEEF comparative study by examining who freelancers are, how they work, and how they position themselves within national labour markets across six countries.

This section presents a comprehensive descriptive profile of freelancers participating in the ENTEEF study across six countries — Indonesia, Poland, Romania, Serbia, Spain, and Ukraine. The objective is to establish a clear empirical foundation for interpreting subsequent analyses of freelancer competences, perceived skill gaps, and training needs developed throughout the report.

Profiling respondents represents a critical first analytical step. Freelancers operate within diverse labour-market environments and differ substantially in demographic composition, educational background, professional experience, and modes of market participation. These characteristics shape how freelancers acquire skills, collaborate with clients, adopt digital tools, and respond to evolving economic and technological conditions. Without understanding these underlying profiles, cross-country comparisons of competencies and skill development risks may reflect structural differences in workforce composition rather than genuine competence disparities.

The descriptive analysis therefore adopts a multidimensional perspective. It examines demographic characteristics, including age and gender distribution, followed by educational attainment and disciplinary background, which provide insight into the knowledge foundations supporting freelance work. Professional positioning is then analysed through years of freelancing experience, main areas of activity, and client engagement patterns, offering indicators of market maturity and occupational specialization.

In addition, the section explores behavioural dimensions of freelancing (Bucher et al., 2020; Wood et al., 2018), including job acquisition strategies, use of digital labour platforms and social networks, and pathways through which freelancers develop skills. Forward-looking indicators — such as perceived challenges, expectations regarding freelancing growth, outlook on the future of freelancing, anticipated use of artificial

intelligence, and investment in upskilling — provide further insight into how freelancers interpret ongoing labour-market transformation.

Taken together, these elements provide an integrated portrait of contemporary freelancers operating within digitally mediated work environments. Rather than treating freelancers as a homogeneous population, the analysis highlights substantial cross-country variation in workforce maturity, specialization patterns, learning behaviour, and opportunity structures. This contextual baseline enables later sections of the report to link competence development and skill gaps to broader socio-professional conditions, strengthening both analytical interpretation and policy relevance.

2.3.2 Age Distribution

This study draws on responses from freelancers across six countries — Indonesia, Spain, Ukraine, Poland, Serbia, and Romania — providing a geographically diverse view of today's independent workforce. The resulting sample is notably young to mid-career, reflecting the demographic profile commonly associated with digital and freelance employment.

The age distribution is concentrated in the early and middle adult segments (Figure 20 and Figure 21). The largest cohort is 29–36 years (20.1%), followed closely by those under 24 (18.3%) and 24–28 (17.7%). Together, these three brackets account for over half of all respondents (56.1%), indicating that the freelance population in this study skews strongly toward early-career and growth-stage professionals.

Representation remains substantial through age 44, with nearly three-quarters of the sample (72.6%) falling under 45. Beyond this point, participation declines steadily: 45–52 years comprise 13.3%, 53–60 account for 9.0%, and those 61 and older represent just 5.1% of respondents.

Overall, the age structure forms a right-tailed distribution, with higher concentrations among younger freelancers and progressively fewer participants in older brackets. This suggests that freelance work in these markets is predominantly driven by younger and mid-career talent, a factor that should be considered when

interpreting motivations, work preferences, technology adoption, and income expectations throughout the report.

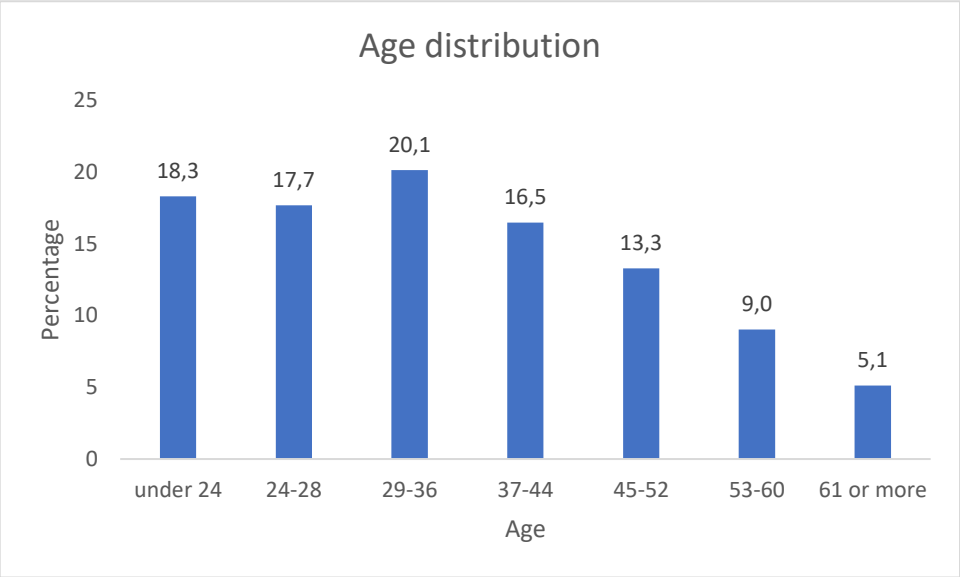


Figure 20. Respondent distribution by age.

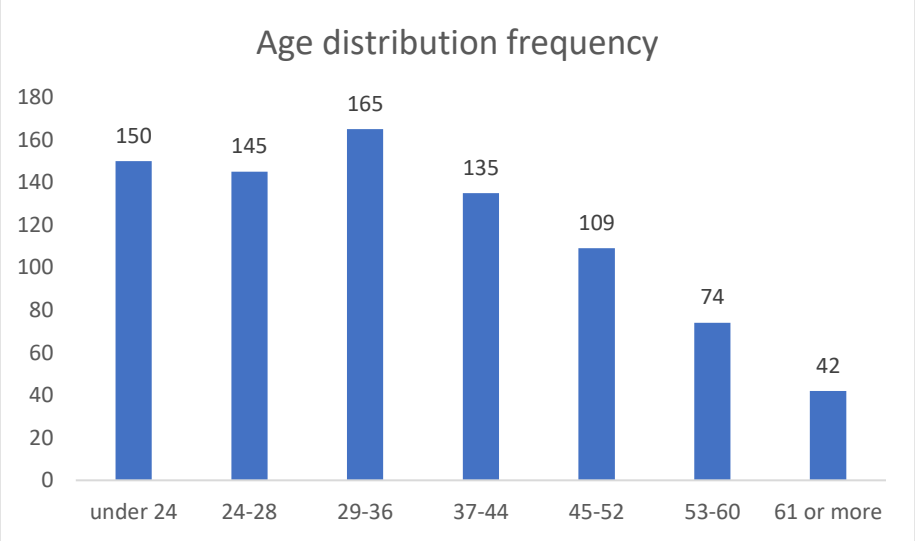


Figure 21. Respondent age distribution frequency.

The age composition of the freelance workforce varies substantially across countries, indicating that national samples represent distinct demographic and career-stage profiles rather than a single, homogeneous population (Figure 22, Figure 23). Statistical tests confirm a significant association between country and age group (Cramer's V = 0.353, $p < .001$), demonstrating that differences in age structure are

systematic and meaningful. Accordingly, each country reflects a particular phase of workforce participation, ranging from early entry to late-career engagement. These variations are evident in both measures of central tendency (mean and median age group) and dispersion (diversity of representation across age bands).

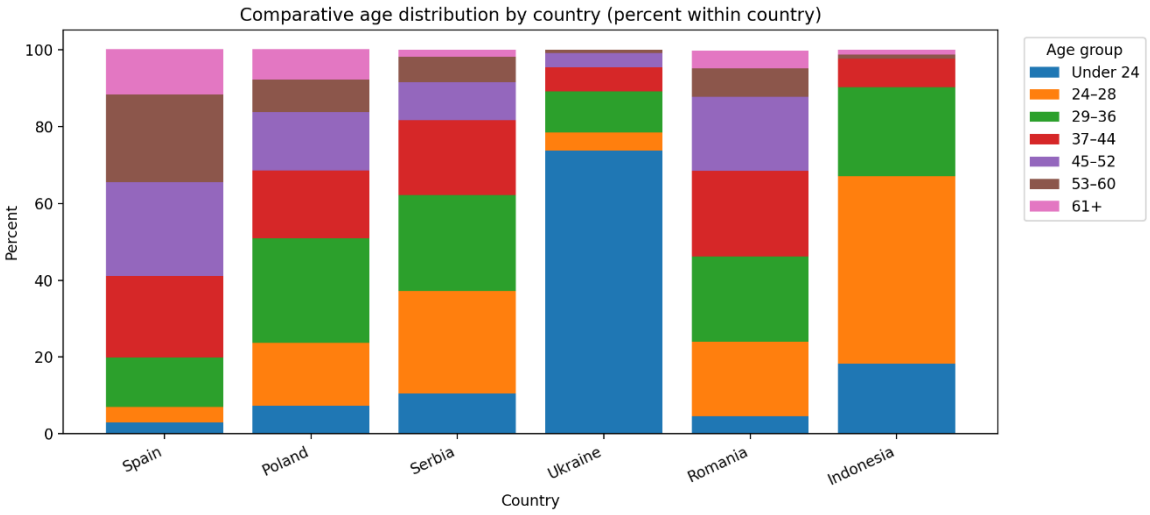


Figure 22. Comparative freelancer age distribution by country.

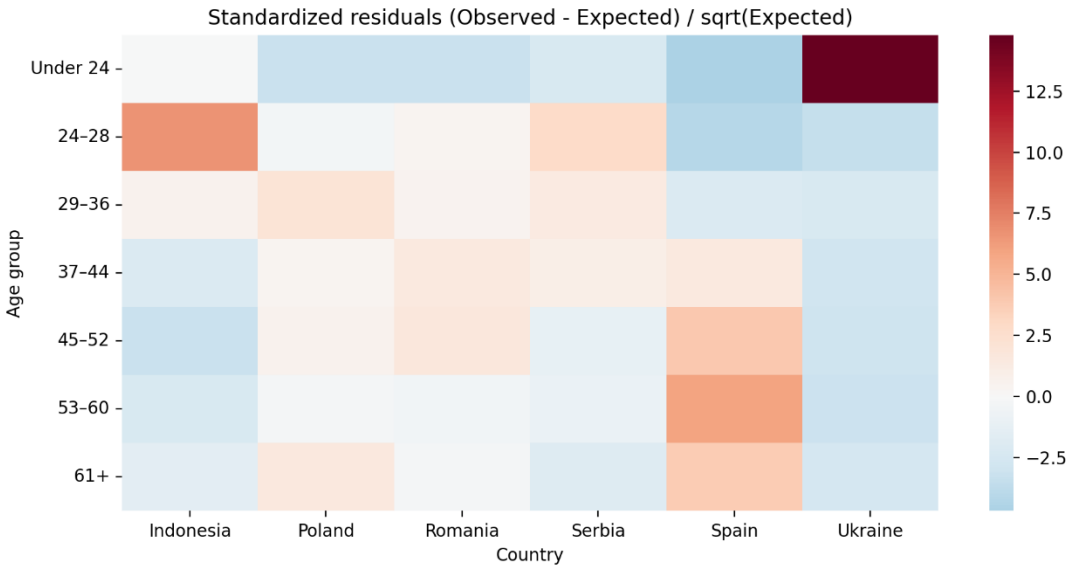


Figure 23. Cross-country differences in freelancer age distribution: Standardized residual analysis.

Two countries — Ukraine and Indonesia — are characterized by youth-concentrated profiles, though with different internal dynamics. Ukraine displays an extremely early-career structure, with 73.8% of respondents under 24 and a median age group of Under 24. More than three-quarters (78.5%) are under 29, and 95.4% are under 45. This distribution is highly concentrated, reflected in a low age diversity index (Simpson = 0.436), indicating that freelance participation is dominated by very recent labour market entrants.

Indonesia, while similarly young overall, presents a more mature young-adult profile. The largest share of respondents falls within 24–28 (48.8%), followed by 29–36 (23.2%), producing a median of 24–28 and a mean age code of 2.30. Although 97.6% of respondents are under 45, participation spans multiple early professional stages rather than clustering exclusively among the youngest group. Thus, both countries skew young, but Ukraine represents predominantly entry-stage engagement, whereas Indonesia reflects early-career consolidation and progression.

At the opposite end of the spectrum, Spain exhibits the oldest age profile. Only 7.0% of respondents are under 29, while participation increases steadily in later age bands. The largest cohorts are 45–52 (24.6%) and 53–60 (22.8%), and Spain is the only country with substantial representation aged 61+ (11.7%). Spain's median age group is 45–52, and its mean age code is the highest in the sample (4.75). Although Spain's diversity index (0.811) indicates representation across several age bands, this diversity is concentrated within mid-to-late career stages rather than evenly distributed across the full spectrum. The Spanish freelance market therefore appears to be composed largely of experienced or late-career professionals.

The remaining countries — Poland, Serbia, and Romania — display mid-career-oriented profiles. Poland and Serbia both peak in the 29–36 bracket, indicating concentrations among established early- to mid-career freelancers. Serbia trends slightly younger overall, with a greater share under 37 (62.2%), while Poland shows broader representation through adjacent age groups. Romania presents the most evenly distributed structure, with similar proportions across 24–28, 29–36, 37–44, and 45–52 (approximately 19–22% each). Correspondingly, Poland and Romania demonstrate the highest diversity scores (≈0.82+), suggesting broad dispersion across multiple contiguous career stages.

Taken together, the findings reveal three principal demographic typologies across the six markets: early-entry concentrated (Ukraine), young-adult growth (Indonesia), mid-career diversified (Poland, Serbia, Romania), and late-career dominated (Spain). These patterns underscore that cross-national comparisons of freelance behaviour should be interpreted within the context of workforce maturity, as differences in age composition may systematically influence experience levels, work preferences, income

expectations, and platform engagement. The observed heterogeneity highlights the importance of accounting for demographic structure when drawing substantive or policy-relevant conclusions from cross-country analyses.

2.3.3 Gender Distribution

The gender composition of the sample is relatively balanced, with a modest skew toward male respondents (see Figure 24). Men represent 55.4% of participants (n=454), while women account for 44.0% (n=361). A small proportion of respondents (0.6%, n=5) chose not to disclose their gender.

Overall, the distribution indicates strong representation from both men and women, enabling meaningful gender-based comparisons in subsequent analyses. While males form a slight majority, the difference is not substantial, and the sample remains broadly reflective of a mixed-gender freelance workforce. The very small share of non-disclosed responses suggests minimal impact from missing or withheld demographic data on the overall findings.

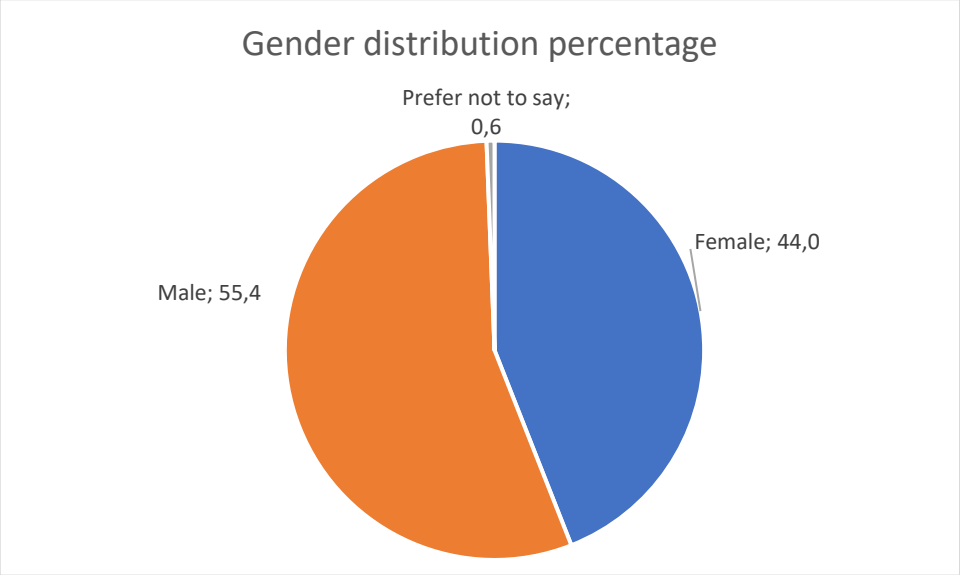


Figure 24. Respondent gender distribution.

Table 24 presents respondent distribution according to gender and country.

Country	Female	Male	Prefer not to say
Indonesia	36.6%	61.0%	2.4%
Poland	59.4%	40.6%	0.0%
Romania	38.9%	61.1%	0.0%
Serbia	47.6%	51.8%	0.6%
Spain	47.4%	52.6%	0.0%
Ukraine	24.6%	73.8%	1.5%

Table 24. Respondent gender distribution by country.

Understanding gender composition is essential for interpreting potential differences in competence importance, perceived proficiency, access to projects, and training needs. Gender is therefore treated as a key categorical variable in later inferential analyses, including Chi-square tests and ANOVA, to explore whether statistically significant differences exist in competence-related perceptions and outcomes.

2.3.4 Education Level

Across all participating countries, the sample is relatively highly educated, with Bachelor (37.0 percent) and Master (32.7 percent) dominating. Doctorate is a small share at 5.5 percent (see Figure 25).

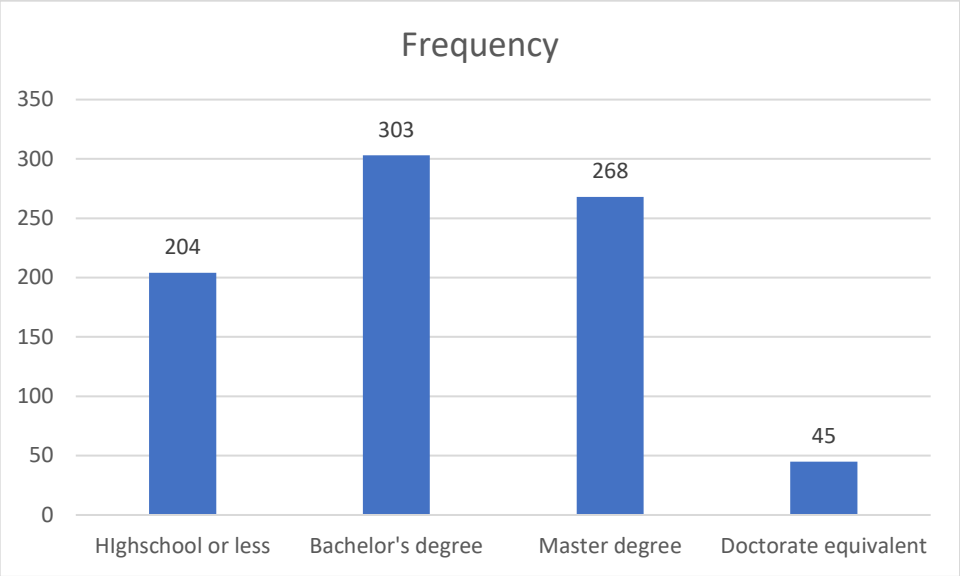


Figure 25. Respondent distribution by education level.

If we compare the dataset of the six countries based on the share of individuals with tertiary education versus non-tertiary education (Figure 26). The data shows strong variation in higher-education penetration, with Eastern and Southern European countries displaying moderate-to-high tertiary attainment, while Ukraine shows a more balanced educational structure of the respondents (Figure 27).

Indonesia is the most concentrated at Bachelor degree (67.1 percent), with a relatively small Master share (19.5 percent). Romania is the most "top-heavy" in the sense that it has a very large Doctorate equivalent share (20.4 percent) and the lowest Highschool or less share (6.5 percent). Poland has the strongest Master degree concentration (47.3 percent), and one of the lower Bachelor shares (23.0 percent). Ukraine has the highest Highschool or less proportion (42.3 percent) and the lowest Master proportion (20.0 percent), compared to the others. Spain and Serbia look similar in having relatively high Bachelor shares (both 40.9 percent), but Serbia has a higher Highschool-or-less share (29.9 percent vs 24.6 percent) and a very low Doctorate share (1.2 percent).

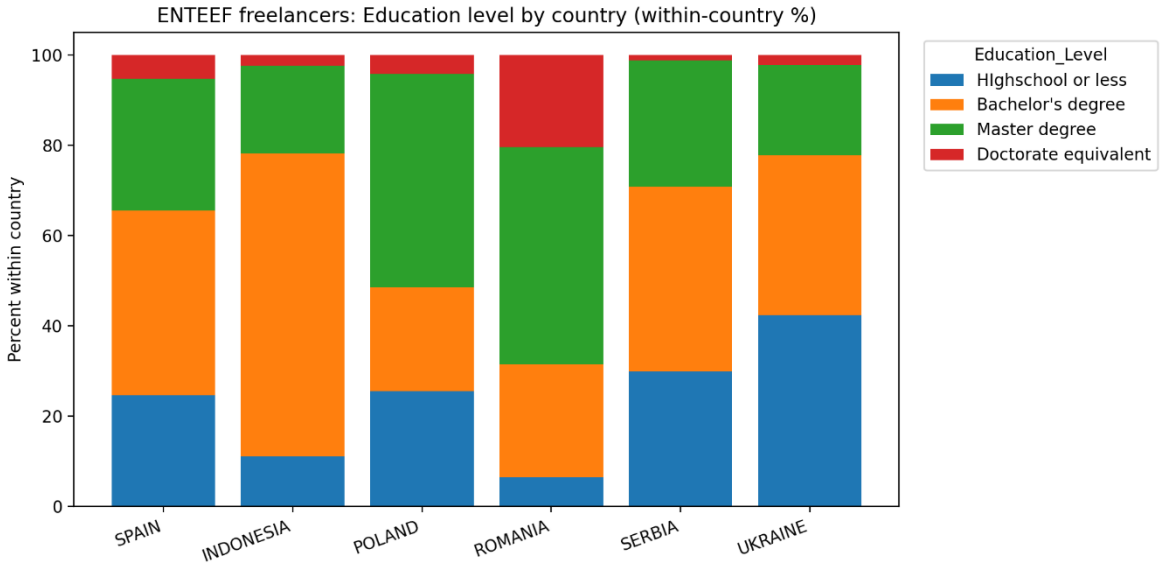


Figure 26. Respondent education level by country.

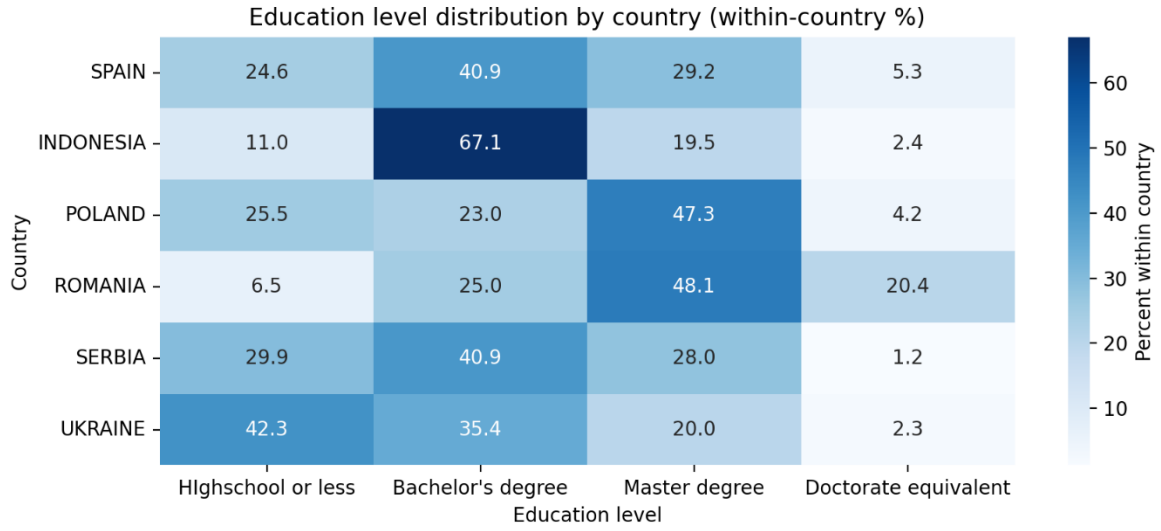


Figure 27. Educational attainment patterns across countries: A heatmap representation.

Hence across all countries, tertiary education represents the majority category. Tertiary shares range from 57.7% (Ukraine) to 93.5% (Romania) and five of six countries exceed 70% tertiary attainment, indicating broadly high educational qualification levels within the observed populations. This suggests a generally well-educated sample base, potentially reflecting urban, professional, or specialized populations.

Romania and Indonesia stand out as strong outliers (Table 25). These countries exhibit extremely skewed educational distributions, with tertiary-educated individuals overwhelmingly dominant. This may indicate a strong higher education participation, sample concentration in skilled sectors, and limited representation of vocational/non-tertiary pathways.

Country	Tertiary share	Tertiary-to-Non Ratio
Romania	93.5%	14.43
Indonesia	89.0%	8.11

Table 25. Outliers in tertiary education.

Spain, Poland, and Serbia form a consistent middle group (Table 26). Education structures of the respondents appear relatively balanced. Roughly 3 tertiary graduates for every non-tertiary individual (table 3). These countries likely maintain stronger vocational or secondary pathways compared with Romania or Indonesia.

Country	Tertiary Share	Ratio
Spain	75.4%	3.07
Poland	74.5%	2.93
Serbia	70.1%	2.35

Table 26. Middle group in tertiary education.

Ukraine differs substantially:

- Tertiary share: 57.7%
- Non-tertiary share: 42.3%
- Ratio: 1.36

This indicates the closest parity between education levels. Ukraine may offer a more diversified skills base, with stronger representation of technical, vocational, or mid-skill labour segments.

In order to better understand how education level relates to skill distribution and potential skill gaps. Specifically, the analysis aims to contextualize freelancers'

personal profiles by educational attainment and to assess how differences in education structures may influence competencies associated with communication, teamwork, and digital literacy. By mapping tertiary and non-tertiary education shares within each country, we try to provide an analytical foundation for interpreting variations in soft and technical skill development among freelancers.

Educational attainment could represent an important proxy for exposure to formal training environments, collaborative learning practices, and digital skill acquisition. Hence, freelancers from countries with a higher concentration of tertiary-educated freelancers may demonstrate stronger baseline capacities in knowledge-intensive tasks, independent work organization, and advanced digital tool usage. However, high tertiary dominance does not automatically translate into balanced skill portfolios; gaps may still emerge in interpersonal communication, practical teamwork dynamics, or applied digital competencies, particularly where education pathways emphasize theoretical knowledge over collaborative or practice-oriented learning.

Conversely, countries with more balanced distributions between tertiary and non-tertiary education may exhibit greater heterogeneity in freelancer profiles. Such diversity can contribute to complementary skill sets, combining practical experience with formal education. This structure may support stronger adaptability in team-based environments and applied communication contexts, although disparities in digital literacy levels may also be more pronounced within these populations.

Understanding these differences is essential for conducting a meaningful gap analysis. Variations in educational composition across countries are likely to influence not only individual freelancer capabilities but also how freelancers engage in remote collaboration, client communication, and digitally mediated work processes. Consequently, cross-country comparisons of communication skills, teamwork capacity, and digital literacy must be interpreted alongside educational profiles to avoid attributing skill differences solely to national or cultural factors.

From a strategic perspective, profiling freelancers by education level enables policymakers, training providers, and platform organizations to design more targeted interventions. Countries with highly tertiary-dominated freelancer populations may benefit from programs strengthening applied collaboration and interpersonal

competencies, while countries with more balanced educational structures may require differentiated digital literacy support tailored to varying baseline skill levels. Ultimately, integrating educational profiling into skill-gap analysis enhances the precision of workforce development strategies aimed at improving freelancer competitiveness and sustainability in digitally mediated labour markets.

2.3.5 Area of education

The analysis of freelancers' educational backgrounds distinguishes between education level and area of education, as these variables capture different dimensions of respondents' profiles and require separate analytical denominators. For education level, the unit of analysis is the individual respondent. The dataset includes N = 820 freelancers, and all education-level percentages are calculated using this total number of respondents. In contrast, area of education allows respondents to select more than one field of study. Consequently, the appropriate denominator is not the number of individuals but the total number of reported educational fields. In this dataset, respondents reported N = 1000 educational fields, indicating that many freelancers possess multidisciplinary educational backgrounds. Therefore, percentages related to area of education should be interpreted as the distribution of reported educational fields, rather than the proportion of unique individuals holding a specific qualification. This distinction is analytically important because it reflects the increasingly hybrid and cross-disciplinary nature of freelance careers, where individuals frequently combine competencies from multiple academic domains.

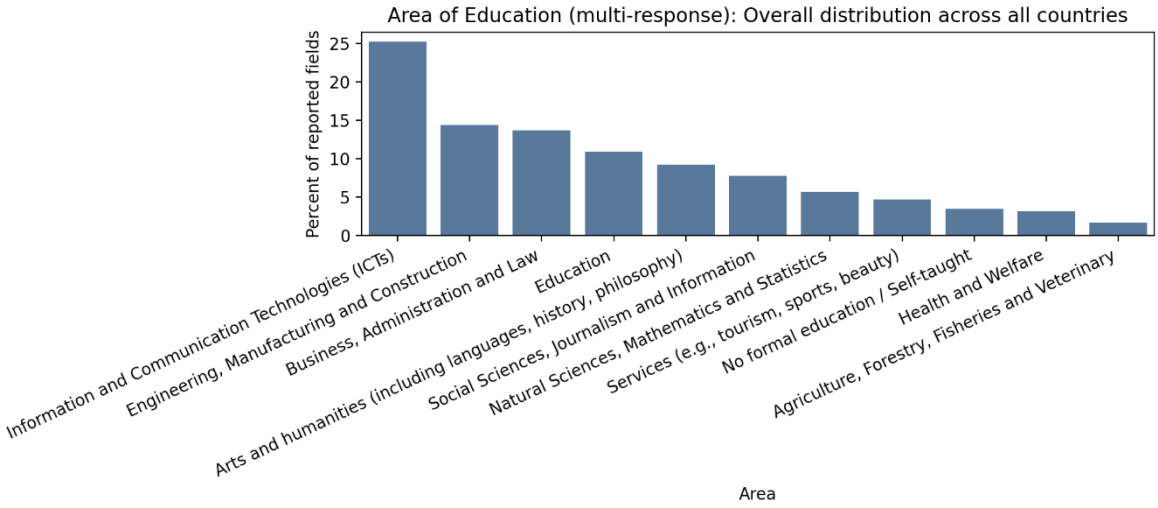


Figure 28. Respondent area of education.

Across all six countries combined, the distribution of reported educational fields shows a clear concentration in technology-oriented disciplines. As indicated in Figure 28, Information and Communication Technologies (ICT) represent the largest share, accounting for 25.2% of all reported fields, making it the dominant educational background among freelancers in the sample. This finding aligns with the digitalized nature of freelance work and the growing importance of platform-mediated and remote professional activities. The second-largest category is Engineering, Manufacturing and Construction (14.4%), followed by Business, Administration and Law (13.7%). All remaining educational fields represent comparatively smaller shares within the pooled dataset, indicating a strong overall orientation toward technical and applied professional disciplines. Taken together, these results suggest that the freelance population analysed here is largely anchored in fields associated with digital production, technical problem-solving, and business-related services.

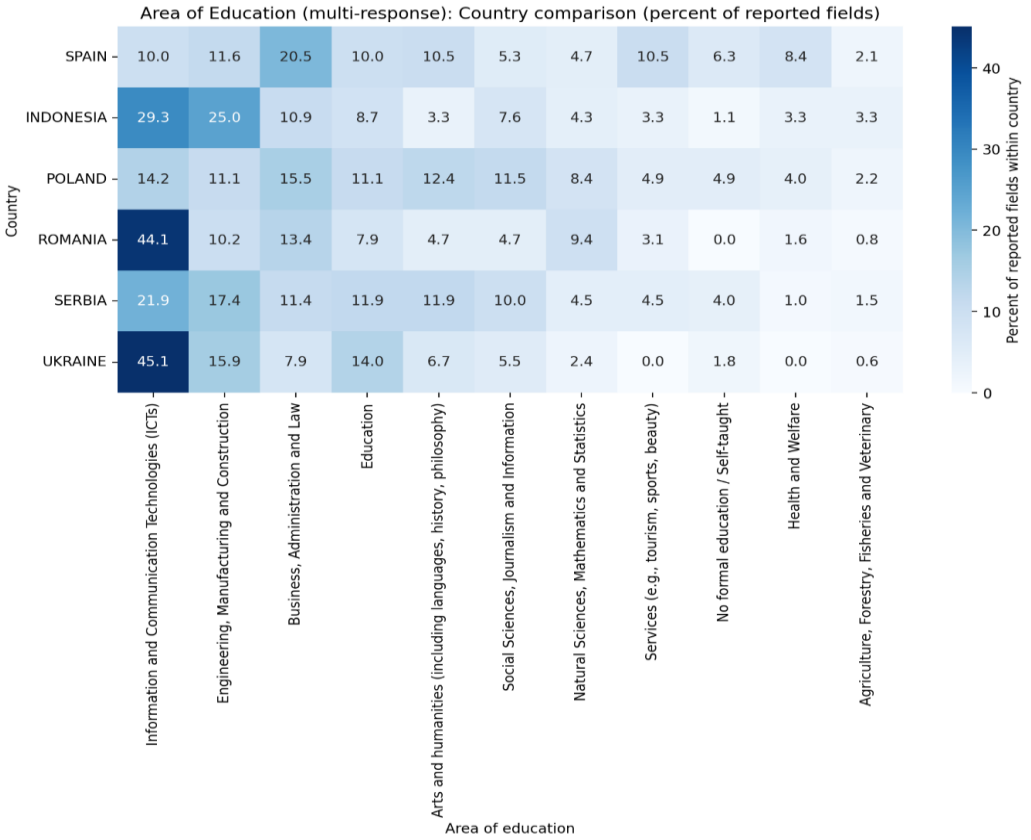


Figure 29. Country comparison in area of education: A heatmap representation.

Ukraine and Romania emerge as the countries with the strongest concentration in ICT-related education, indicating a highly technology-oriented freelancer profile (Figure 29). Spain shows relatively stronger representation in Business, Administration and Law, suggesting a freelancer ecosystem more oriented toward managerial, administrative, or consulting activities compared with other countries. Indonesia displays a dual concentration in ICT and Engineering, reflecting a technically focused educational structure. Ukraine reports a high absolute number of ICT field selections (74 reports); however, its proportional share is lower than Romania's because educational fields are more evenly distributed across categories, indicating greater disciplinary diversity.

These variations illustrate that similar headline counts can reflect different underlying structures depending on how educational backgrounds are distributed across fields.

An additional interpretative dimension concerns the average number of reported educational fields per respondent. Countries differ in the extent to which freelancers report multiple areas of study. Poland (1.37 fields per respondent) and Ukraine (1.26) demonstrate higher levels of multi-field reporting compared with Spain (1.11) and Indonesia (1.12).

This distinction is important for interpreting skill profiles. Higher counts of ICT or other fields may partly result from respondents possessing multidisciplinary educational backgrounds rather than a higher concentration of specialists in a single domain. In practical terms, freelancers in countries with higher multi-field reporting may exhibit broader skill combinations, potentially supporting adaptability, cross-functional collaboration, and hybrid professional roles.

Because area-of-education percentages reflect fields rather than individuals, they should be interpreted as indicators of the knowledge ecosystem underlying freelancer competencies. This methodological clarification is essential for subsequent skill-gap analysis. Educational diversity and disciplinary concentration provide contextual explanations for observed differences in communication skills, teamwork capacity, and digital literacy across countries.

Understanding whether freelancers are narrowly specialized or broadly multidisciplinary allows for more accurate interpretation of skill strengths and deficiencies. In particular, ICT dominance may signal strong digital foundations, while broader field distributions may support transferable skills relevant to collaboration and communication in freelance work environments.

2.3.6 Years of experience as a freelancer

Freelancing experience was measured using the categorical variable Years_Experience_Freelancer, which classifies respondents into four ordered categories:

- less than 1 year,
- 1–5 years,
- 6–10 years,

– more than 10 years.

The variable contains no missing observations, ensuring full comparability across countries. Because categories represent ordered stages of professional maturity, the analysis examines both overall distribution patterns and within-country compositions to understand differences in freelancer seniority across national contexts.

Across the full ENTEEF sample, the dominant freelancer profile corresponds to early-stage professional experience, with 44.0% of respondents reporting 1–5 years of freelancing activity. This indicates that the freelance workforce represented in the dataset is largely composed of individuals who have moved beyond entry-level experimentation but have not yet reached long-term career maturity. The remaining distribution shows a relatively balanced structure ”Less than 1 year” 20.4%, 6–10 years 17.1% and more than 10 years 18.5%. Substantial variation emerges when examining experience composition within each country.

As indicated in Figure 30 and Figure 31, Spain displays the most experienced freelancer profile in the sample. A notable 40.9% of Spanish respondents report more than ten years of freelancing experience, the highest share among all countries. This suggests a mature freelance ecosystem with established professional trajectories and accumulated market expertise.

In contrast, Indonesia is strongly concentrated in early-career freelancing stages. Approximately 72.0% of respondents fall within the 1–5 year category, while only 3.7% report more than ten years of experience. This pattern indicates a rapidly expanding but comparatively young freelance market.

Ukraine represents the most junior freelance profile. A majority (53.8%) report less than one year of experience, and only 4.6% belong to the most experienced category. This distribution suggests a recently expanding freelance sector, potentially influenced by economic or labour-market transitions encouraging new participation.

Serbia also demonstrates an early-career orientation, with 28.0% of freelancers reporting less than one year of experience and only 5.5% exceeding ten years. While slightly more balanced than Ukraine, the Serbian profile still reflects a developing freelance environment.

Poland and Romania occupy an intermediate position between mature and emerging markets. In both countries, the largest group consists of freelancers with 1–5 years of experience (43.0% and 48.1%, respectively), accompanied by meaningful shares in both the 6–10 year and more-than-10-year categories. These distributions indicate relatively stable and progressively developing freelance ecosystems.

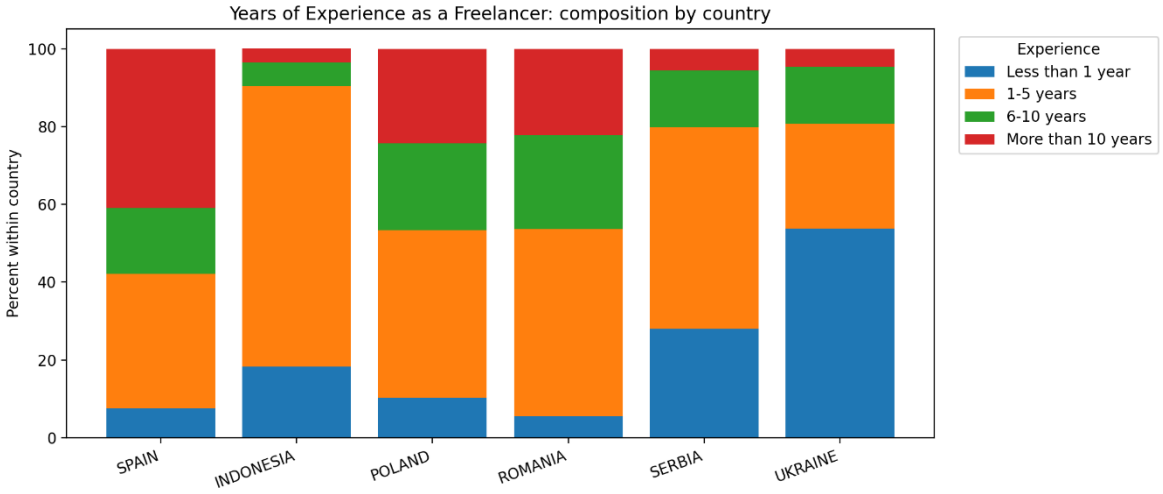


Figure 30. Experience as a freelancer by country.

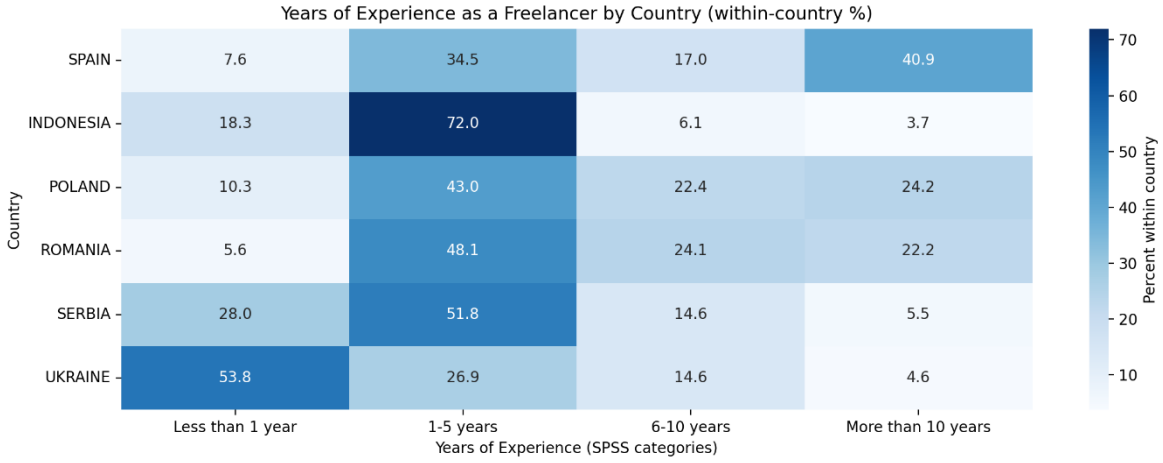


Figure 31. Years of experience by country: A heatmap representation.

Taken together, the results suggest a freelancer ecosystem characterized by continuous inflow of new entrants alongside a stable segment of highly experienced professionals. The coexistence of early-career and senior freelancers provides an

important contextual basis for interpreting differences in skills, professional confidence, and collaborative capacity observed elsewhere in the study.

To facilitate cross-country comparison, a seniority index was constructed by assigning ordinal scores to the experience categories:

- Less than 1 year = 1
- 1–5 years = 2
- 6–10 years = 3
- More than 10 years = 4

Mean scores were then calculated for each country, with higher values indicating greater overall professional seniority, as indicated in Figure 32.

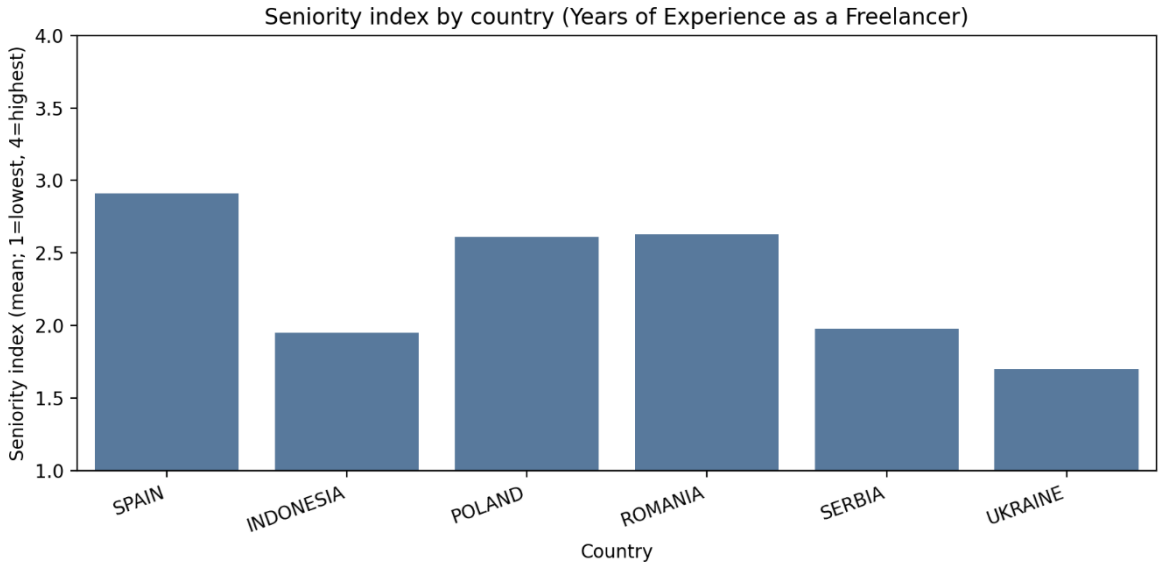


Figure 32. Seniority index by country.

Spain emerges as the most senior freelance market, with a mean index of 2.91, supported by its large proportion of long-term freelancers. Poland and Romania follow closely, with mean scores around 2.6, reflecting balanced experience distributions. Indonesia and Serbia show more junior profiles (means approximately 2.0), while Ukraine records the lowest seniority level (mean = 1.70) and a median category of less than one year.

Across all countries combined, the pooled mean seniority index equals 2.34, confirming that the overall ENTEEF freelancer population is positioned between early-career and mid-career stages.

2.3.7 Main area of freelancer activity

The analysis of freelancers' main areas of activity provides important insight into the occupational structure of the ENTEEF sample and helps contextualize differences in skill demands across countries. Based on N = 820 respondents, freelancing activity across the pooled sample is primarily concentrated in digitally oriented and creative professions, which together account for 48.2% of all freelancers (Software Development and Information Technology = 26.6%, n = 218; Creative and Marketing = 21.6%, n = 177).

Two sectors clearly dominate the overall distribution. Software Development and Information Technology represent the largest share of freelancer activity (26.6%, n = 218), followed by Creative and Marketing services (21.6%, n = 177). Together, these two categories account for nearly half of all freelance activity, highlighting the strong digital and project-based orientation of contemporary freelance work across the ENTEEF sample.

A second tier of activities includes Professional Services (12.7%, n = 104) and Sales and Marketing Support (12.1%, n = 99), indicating substantial participation in advisory, administrative, and business-support functions requiring client interaction and coordination skills. Other activity areas represent considerably smaller shares, including Teaching (6.5%, n = 53), Writing and Translation (5.4%, n = 44), and Technical Engineering (5.0%, n = 41), while each remaining category accounts for less than 2% of respondents. Overall, freelancing within the sample is therefore structurally concentrated in knowledge-intensive and service-oriented occupations.

Despite these shared overall trends, significant cross-country variation emerges in the specialization and diversification of freelancer activities.

Romania stands out as the clearest case of occupational specialization. Nearly half of Romanian freelancers report Software Development and IT as their main activity

(46.3%, n = 50 of 108 respondents), far exceeding all other sectors within the country. The next largest categories are Professional Services (13.0%, n = 14), Creative and Marketing (12.0%, n = 13), and Teaching (11.1%, n = 12). In contrast, Romania shows comparatively limited representation in administrative or support-oriented freelance roles, with Sales and Marketing Support accounting for only 1.9% (n = 2) and Clerical and Data Entry only 0.9% (n = 1). This pattern indicates a highly technology-focused freelance ecosystem characterized by strong technical specialization and limited occupational diversification.

Spain exhibits a markedly diversified freelance structure. The largest sectors are Professional Services (25.7%, n = 44) and Sales and Marketing Support (21.6%, n = 37), which together represent nearly 47% of Spanish freelancers. By comparison, Software Development and IT accounts for only 6.4% (n = 11) and Creative and Marketing 12.3% (n = 21). Spain also demonstrates participation across a wide range of smaller sectors, including Healthcare (2.9%, n = 5), Hospitality and Events (2.9%, n = 5), Writing and Translation (2.9%, n = 5), and Agriculture-related services (1.2%, n = 2). This dispersion suggests a mature freelance ecosystem characterized by occupational diversity and a strong service-professional orientation.

Indonesia demonstrates a hybrid structure combining creative and technical activities. The dominant sector is Creative and Marketing (29.3%, n = 24), followed by Software Development and IT (22.0%, n = 18). Additional notable participation appears in Technical Engineering (12.2%, n = 10) and Teaching (8.5%, n = 7). Administrative and support roles remain smaller but visible, including Clerical and Data Entry (9.8%, n = 8) and Sales and Marketing Support (6.1%, n = 5). Overall, Indonesia's distribution reflects a heterogeneous freelancer population with activity spread across creative, technical, and applied professional domains.

Poland presents one of the most balanced activity distributions in the sample. The largest category is Creative and Marketing (20.0%, n = 33), followed by Professional Services (18.8%, n = 31) and Sales and Marketing Support (15.8%, n = 26). Software Development and IT represent a meaningful but not dominant share (13.3%, n = 22). Poland also displays comparatively strong representation in Writing and Translation (10.9%, n = 18) and moderate participation in Teaching (6.7%, n = 11) and

Clerical/Data Entry (6.7%, n = 11). This distribution indicates a diversified freelance market combining communication-oriented, professional, and technical activities.

Serbia shows a high degree of concentration in two primary domains. Creative and Marketing is the dominant sector (42.1%, n = 69), followed by Software Development and IT (25.0%, n = 41). Together, these two activities account for approximately 67% of Serbian freelancers. All other sectors remain comparatively small, including Sales and Marketing Support (11.6%, n = 19) and Teaching (7.3%, n = 12), while most remaining categories individually account for less than 5% of respondents. This pattern suggests a dual-track freelance ecosystem dominated by digital creative production and technical work.

Ukraine appears concentrated across a limited number of activity categories, with a strong dominance of Software Development and IT (58.5%, n = 76 of 130 respondents) — the highest national share among all countries. Secondary activities include Creative and Marketing (13.1%, n = 17), Sales and Marketing Support (7.7%, n = 10), and Writing and Translation (6.9%, n = 9). Several service-oriented sectors show minimal participation, including Healthcare, Agriculture, and Service Support (0 respondents) and Hospitality and Events (0.8%, n = 1). This concentration suggests a narrower occupational structure centred primarily on digital work, consistent with an emerging freelance ecosystem undergoing sectoral consolidation.

The cross-country comparison reveals three distinct freelancer ecosystem types:

- Highly specialized digital markets — Romania and Ukraine (IT shares of 46.3% and 58.5%, respectively).
- Diversified service-oriented markets — Spain and Poland, where no single activity exceeds roughly one-quarter of freelancers.
- Creative–digital dual markets — Indonesia and Serbia, where Creative and Marketing and IT jointly dominate freelancer activity.

These structural differences provide essential context for interpreting cross-country variation in communication skills, teamwork practices, and digital literacy competencies examined in subsequent sections of the analysis.

2.3.8 Number of clients in the past 12 months

Across ENTEEF countries, the typical freelancer works with a small number of clients per year, but the distribution is highly skewed everywhere (a small share report very high numbers). Spain stands out as a structurally different market with substantially higher client volumes across the whole distribution, not just because of a few extreme cases. Poland is a clear second tier, while Indonesia, Romania, Serbia, and Ukraine cluster together at lower typical client counts.

As indicated in Figure 33, Variable Num_Clients_12M is extremely right-tailed (some respondents report extremely large values). Because of that, means can be misleading and are not a good basis for strategic comparisons. For decision-making, we prioritize:

- median and IQR (25th–75th percentile) as the best "typical freelancer" indicators,
- a winsorized mean that caps values within each country at the 1st and 99th percentiles, which keeps the full sample while preventing a handful of extreme values from dominating the average.

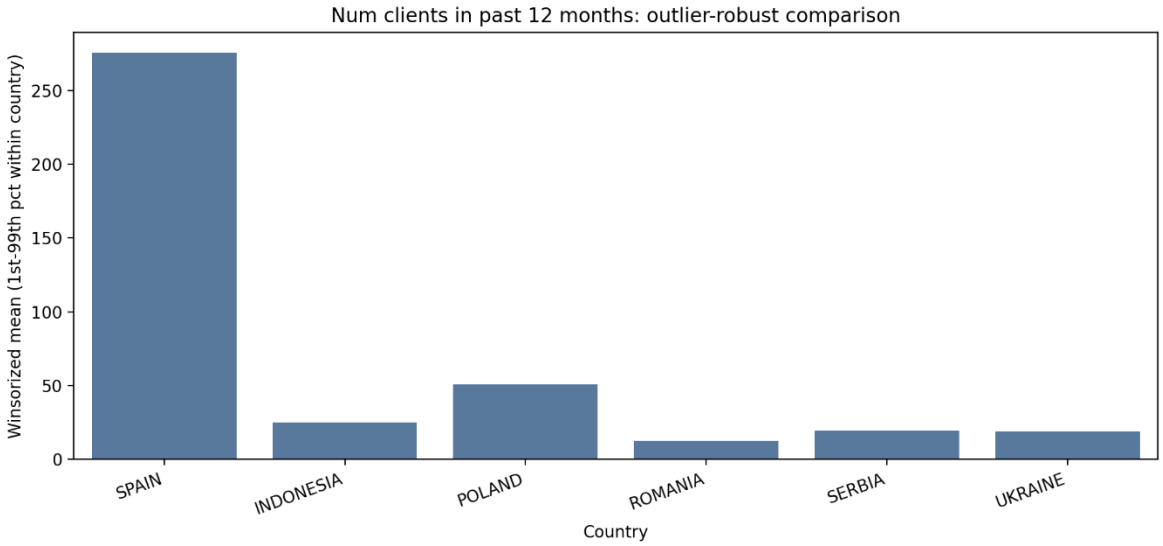


Figure 33. Number of clients in past 12 month.

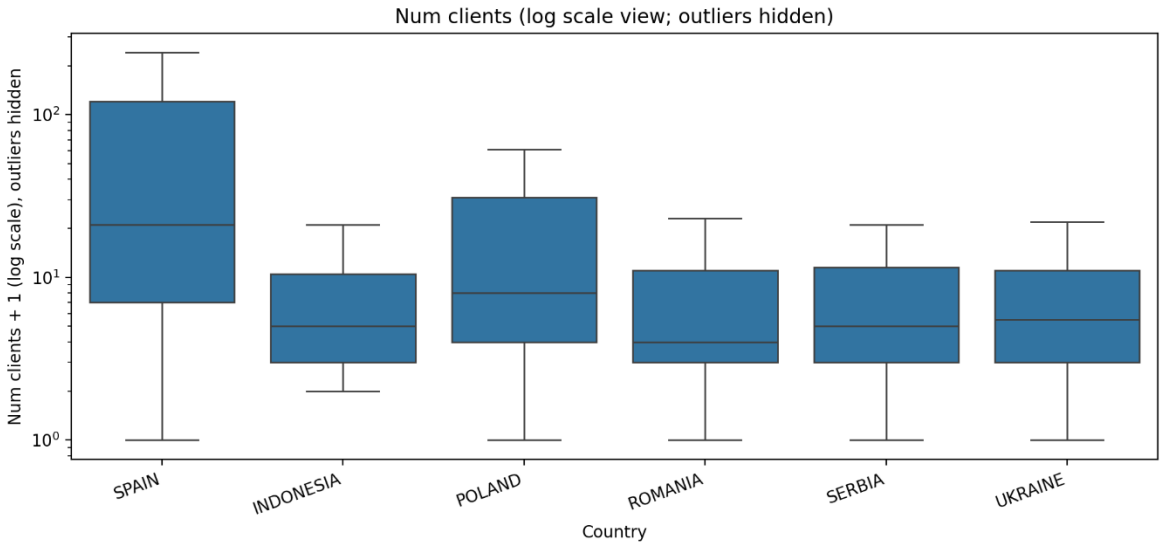


Figure 34. Number of clients in past 12 month, outliers hidden.

Spain has the highest typical client volume by a wide margin (Figure 34). The median freelancer in Spain reports 20 clients/year, and even the middle 50% spans 6 to 120 clients. This is far above every other country.

Poland is the next highest with a median of 7 and an IQR of 3 to 30, indicating a more “multi-client” pattern than the rest of the non-Spain countries.

Romania is the lowest typical client market with a median of 3 (IQR 2 to 10).

Indonesia, Serbia, and Ukraine are very similar in the central tendency: medians around 4 to 4.5 with IQRs that top out around 10 to 10.5.

Using a non-parametric omnibus test appropriate for skewed data, client volumes differ significantly across countries (Kruskal–Wallis $p < 0.001$). Pairwise comparisons show:

- Spain is significantly higher than every other country.
- Poland is significantly higher than Romania, Serbia, Ukraine, and Indonesia.
- Differences among Indonesia, Romania, Serbia, and Ukraine are generally smaller and often not statistically distinct once we correct for multiple comparisons.

This supports the strategic reading of a "Spain tier", a "Poland tier", and a "lower-volume cluster".

A higher number of clients typically indicates a more fragmented demand structure and more frequent client acquisition/relationship management work. Spain's pattern suggests a market where freelancers more often operate with many concurrent or rotating clients, which may increase demand for capabilities like lead generation, negotiation, contract handling, and workflow management.

Poland's second-tier profile indicates meaningful multi-client activity but less extreme than Spain, suggesting a balanced environment where both repeat-client and multi-client models likely coexist.

The lower-volume cluster may reflect a higher reliance on repeat clients, longer engagements, or fewer active client relationships per year, which shifts strategic support needs toward retention, pricing, and project continuity rather than constant acquisition.

To better understand how freelance client activity is distributed across respondents, the analysis applies an 80–20 (Pareto) framework (Dunford & Tamang, 2021), which provides a more intuitive strategic interpretation than traditional averages or medians. Rather than focusing on central tendencies, the Pareto approach evaluates how concentrated client volume is within each national freelancer market.

Two complementary indicators are used:

- top 20% share — the proportion of all reported clients accounted for by the 20% most client-active freelancers,
- percentage of respondents needed to reach 80% of total clients — an indicator of how broadly client activity is distributed across the freelancer population. Lower values indicate stronger concentration among a small elite group.

Because some countries contain extreme reported values, results are presented both as Raw Pareto estimates, using reported data as provided and Winsorized Pareto estimates (1st–99th percentile), which cap extreme values within each country to ensure that a small number of unusually large responses do not dominate interpretation.

The overall pattern across all six countries, client volume is consistently concentrated, confirming that freelance markets tend to operate according to unequal productivity distributions. However, the degree of concentration varies substantially, revealing distinct national market structures ranging from highly top-heavy ecosystems to more broadly distributed client bases.

Country-level strategic interpretation

Spain displays the strongest concentration in the dataset. In raw terms, the top 20% of freelancers account for 99.6% of all reported clients, while the top 10% alone account for 99.0%, indicating that raw totals are heavily influenced by a very small number of extreme observations (see Figure 35). After applying winsorization, Spain remains highly concentrated but becomes analytically interpretable: the top 20% account for 91.5% of clients, and only 11.7% of respondents are needed to reach 80% of total clients.

Spain represents a strongly hierarchical freelance market in which a small group of high-throughput freelancers dominates client acquisition and activity levels.

Indonesia also exhibits high concentration. The raw top-20 share reaches 89.1%, and even after robustness adjustment remains 88.6%. Only 9.8% of freelancers are required to account for 80% of clients. Client volume is driven by a relatively small segment of highly active freelancers, suggesting a competitive environment where experience, reputation, or platform positioning may strongly influence market success.

Poland's raw distribution indicates strong inequality, with the top 20% accounting for 92.1% of clients. After winsorization, concentration decreases to 85.7%, and 15.2% of respondents are needed to reach 80% of client volume. Poland demonstrates a clear high-performance freelancer segment, though client distribution is less extreme than in Spain or Indonesia once outliers are controlled.

Romania shows the lowest concentration among the six countries. The winsorized top-20 share equals 77.7%, and 23.1% of freelancers are required to account for 80% of clients. Client activity is spread across a broader freelancer base, indicating fewer dominant "client factories" and a comparatively more inclusive distribution of market opportunities.

Serbia occupies an intermediate position. The winsorized top-20 share reaches 81.3%, and 18.9% of respondents are needed to accumulate 80% of clients. The Serbian freelance market shows meaningful concentration but retains a wider active base than highly top-heavy systems.

Ukraine demonstrates a pattern closely aligned with Serbia. The winsorized top-20 share equals 82.0%, and 18.5% of freelancers account for 80% of client volume. Client distribution reflects a moderately concentrated ecosystem where successful freelancers are important drivers, but market participation remains relatively broad.

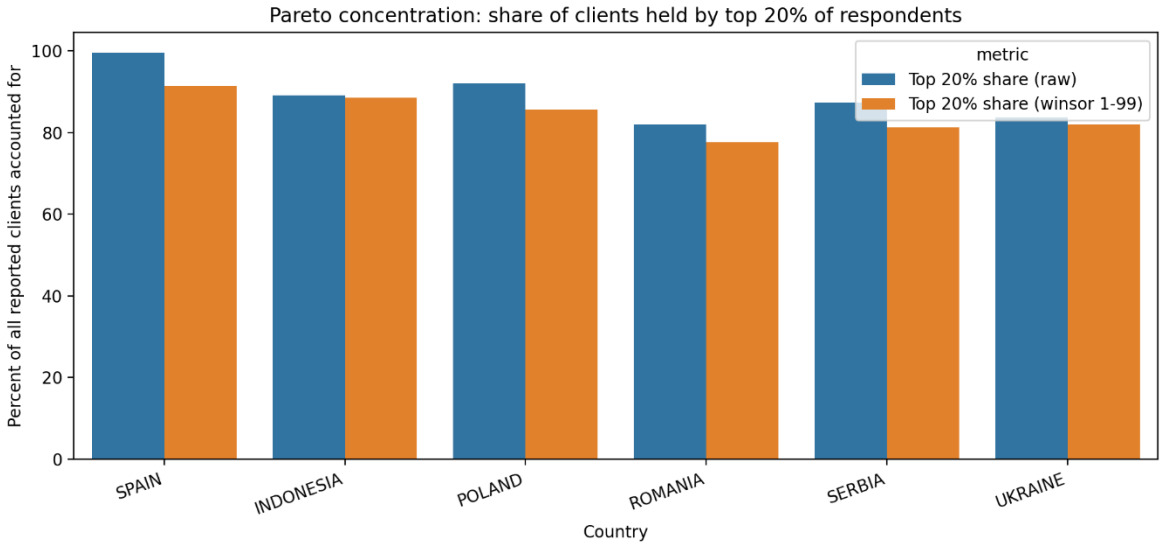


Figure 35. Pareto market concentration.

The Pareto analysis suggests that freelancer ecosystems are shaped not only by skills and education but also by market concentration dynamics. Highly concentrated markets may reward experience, reputation, and platform visibility disproportionately, potentially widening performance gaps between freelancers. More balanced markets, by contrast, may offer broader access to client opportunities but lower individual throughput at the top end. Understanding these structural differences is essential when interpreting skill gaps, income stability, and professional development outcomes across countries.

2.3.9 Summary - implications

Overall, the freelancer population is characterized by a relatively young to mid-career workforce, high levels of tertiary education, and strong concentration in digitally oriented and knowledge-intensive occupations, particularly Information Technology and creative services. This is consistent with the findings of Merkel (2019), Sima et al. (2020), Wu & Huang (2024) and Van Laar et al. (2017). Despite shared structural features, national freelancer ecosystems differ substantially in demographic composition, professional seniority, specialization patterns, and client acquisition strategies.

Aligned with the findings of Lo Presti et al. (2018) and Soga et al. (2022), freelancers primarily develop skills through online learning and work experience rather than

formal education pathways, reflecting a shift toward flexible and practice-based professional development. Continuous upskilling is widespread, with most freelancers investing in learning at least occasionally, although the intensity of engagement varies across countries. Digital labour platforms, professional networking tools, and social media collectively form the core infrastructure for accessing work, but reliance on specific channels differs significantly between national contexts.

Across countries, freelancers express broadly optimistic expectations about the future of freelancing, though optimism levels vary and are shaped more by perceived demand stability and market context than by demographic characteristics such as age or education. Income stability, market uncertainty, and the need for continuous adaptation emerge as the dominant near-term challenges.

Overall, the profiling results portray freelancers as an adaptive but heterogeneous workforce navigating rapidly evolving digital labour markets. These findings provide essential context for interpreting competence gaps and inform the design of targeted training, policy interventions, and ecosystem support measures aimed at strengthening freelancer sustainability and competitiveness.

Differences in experience composition provide essential context for interpreting skill-related outcomes. More experienced freelancer populations, such as Spain's, are likely to demonstrate stronger professional autonomy, client communication practices, and team collaboration capabilities developed through sustained market participation. Conversely, countries with younger freelancer profiles may exhibit higher variability in communication and teamwork competencies as individuals transition into freelance work environments.

Early-career concentration, as observed in Ukraine, Indonesia, and Serbia, may also influence digital literacy patterns. While newer freelancers may possess strong baseline digital familiarity, they may lack advanced professional digital competencies related to workflow management, collaboration platforms, or long-term client relationship management.

Accordingly, experience structure should be considered alongside education level and educational field when conducting skill-gap analysis. Freelancer seniority

functions as a key explanatory factor linking personal professional trajectories to differences in communication skills, teamwork readiness, and digital literacy capacities across countries.

2.4 Freelancer ecosystem

2.4.1 Freelancers' job acquisition channels

The analysis of client acquisition channels provides insight into how freelancers access markets and develop professional opportunities across countries. While several recruitment channels are widely used across the ENTEEF sample, meaningful variation emerges in the relative importance of digital platforms, professional networks, and socially mediated pathways (see Figure 36).

Digital labour platforms are used by a majority of freelancers in all countries, confirming their central role in contemporary freelance work organization. However, adoption levels vary meaningfully across national contexts. Usage ranges from 60.0% in Ukraine, representing the lowest level of platform reliance, to 78.0% in Indonesia, the highest observed share. Other countries fall between these values, indicating that platform-based work constitutes a common but unevenly embedded mechanism for accessing clients.

This variation suggests differences in platform maturity, digital labour market integration, or alternative client acquisition strategies operating within national freelancer ecosystems.

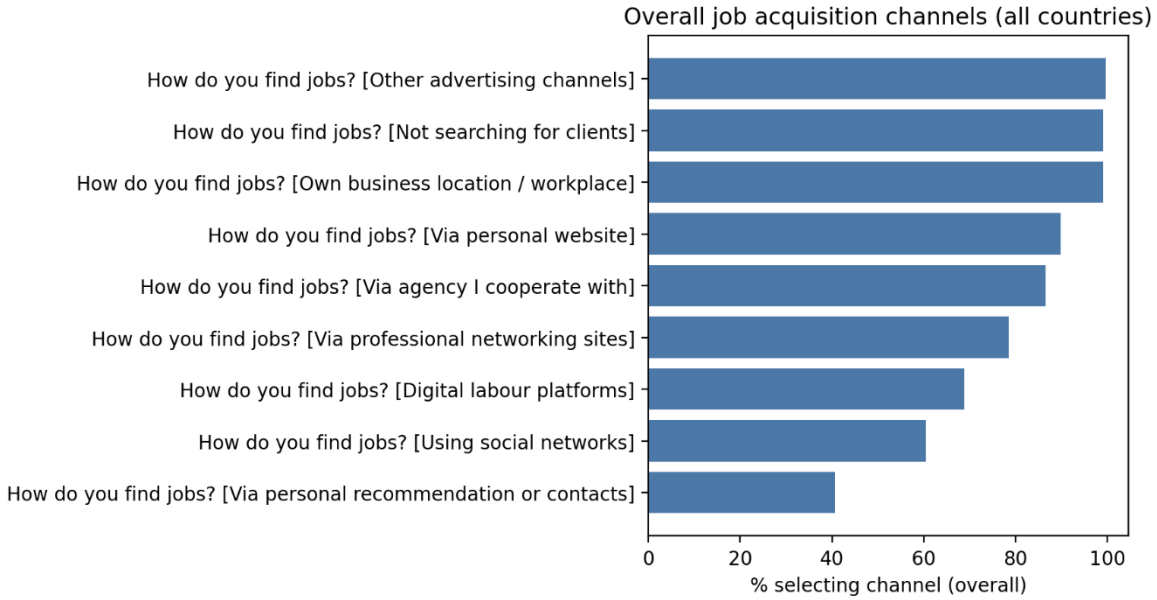


Figure 36. Overall job acquisition channels.

Professional networking platforms represent one of the most consistently used channels across all countries (Figure 37). Usage levels remain high everywhere, peaking at 89.0% in Indonesia. Even the lowest observed share, Romania at 70.4%, indicates widespread reliance on professional networking tools for visibility, reputation building, and client engagement. The relatively narrow cross-country range for this channel suggests that professional networking sites function as a near-universal infrastructure supporting freelance market participation.

Figure 37. Job acquisition channels by country: A heatmap representation.

The most substantial variation between countries appears in socially mediated client acquisition channels. Use of social networks varies dramatically, ranging from 36.6% in Indonesia to 72.2% in Romania, making this the channel with the largest observed cross-country spread. Romania stands out as particularly reliant on social platforms despite comparatively lower use of personal recommendation networks.

In contrast, reliance on personal recommendations and contacts ranges from 22.2% in Romania to 57.3% in Indonesia. Indonesia demonstrates strong dependence on interpersonal referral networks, while Romania represents the opposite profile — high social media usage but relatively limited reliance on direct personal contacts.

These contrasting patterns suggest different trust-building mechanisms across markets: some freelancers rely more on digitally mediated visibility, while others depend on relational or reputation-based pathways.

Three acquisition channels — Other advertising channels, Own business location/workplace, and Not searching for clients — show reported usage rates close to 99% in every country. Such uniformity is substantively unusual and may indicate a survey design issue, default selection behaviour, or questionnaire filtering effects rather than genuine behavioural patterns. Accordingly, these items are reported as coded but should not be used for substantive interpretation without verification of questionnaire logic and response routing.

When ranked by overall usage, client acquisition channels reveal two distinct patterns:

1/ Universally adopted channels with limited cross-country variation

- Professional networking platforms
- Digital labour platforms

2/ Context-dependent channels showing large behavioural differences

- Social networks
- Personal recommendations and contacts

The magnitude of variation across countries indicates that freelancers combine digital infrastructure with locally embedded networking practices, producing distinct national models of client acquisition.

Aligned with the works of van den Born & van Witteloostuijn (2018) and Jacobs et al. (2019), these findings suggest that freelancer success is shaped not only by skills and experience but also by the structure of opportunity channels available within each country. Markets with stronger reliance on personal contacts may reward relationship-building and reputation accumulation, while markets emphasizing social networks or platforms may prioritize digital visibility, branding, and algorithmic discoverability. Understanding these differences is essential for interpreting cross-country variations in communication skills, teamwork practices, and digital literacy competencies examined in subsequent sections of the ENTEEF analysis.

2.4.2 Effectiveness of client acquisition channels and experience dynamics

The ENTEEF survey does not include a direct measure of channel effectiveness such as conversion rates or revenue generated per lead. To approximate effectiveness in a comparable and transparent way, a practical proxy was constructed based on client outcomes.

Average number of clients acquired in the past 12 months (Num_Clients_12M) among freelancers who reported using a given channel. To ensure robustness client counts were winsorized within each country at the 1st and 99th percentiles to limit the influence of extreme values. Channels were evaluated only when at least n ≥ 25 users were present within a country, avoiding instability caused by very small samples. This proxy should be interpreted as an indicator of association with higher client volume, not as a causal measure of channel performance, since freelancers typically use multiple acquisition channels simultaneously.

Most effective channel by country (Clients Proxy)

Using the winsorized client-volume proxy, distinct national patterns emerge regarding which channels are associated with higher client acquisition outcomes (see Table 27).

In Indonesia, personal recommendations and contacts emerge as the strongest channel, with freelancers using this pathway reporting an average of approximately 40 clients per year. This suggests that relational trust and informal referral systems play a central role in scaling freelance activity within the Indonesian market.

In Poland, social networks show the highest effectiveness proxy, with users averaging approximately 51 clients annually. This indicates that digitally mediated visibility and social engagement may function as key drivers of freelancer market access and expansion.

For Romania, digital labour platforms appear most effective, with users averaging approximately 13.7 clients. This aligns with earlier findings showing strong IT specialization, suggesting that structured online marketplaces serve as a primary mechanism for connecting technically specialized freelancers with clients.

A similar pattern emerges in Serbia, where digital labour platforms also rank highest, associated with an average of approximately 21.4 clients among users. Platforms therefore appear to provide scalable client pipelines in markets characterized by strong digital and creative specialization.

In Spain, personal recommendations and contacts rank highest, with an exceptionally large average of approximately 402 clients among users. Even after winsorization, this value remains unusually high, indicating that extreme observations continue to influence results. Spain's effectiveness ranking should be interpreted as directional rather than numerically reliable until the distribution of Num_Clients_12M is further validated for potential reporting or data-quality issues.

In Ukraine, personal recommendations and contacts again appear most effective, associated with approximately 26.5 average clients among users. This suggests that interpersonal networks remain an important mechanism for sustaining freelance activity in an emerging market context.

The country comparison reveals three broad acquisition models (Cross-Country Strategic Pattern) presented in Table 27. These differences indicate that freelancer success pathways are shaped by national ecosystem structures rather than a single universal acquisition strategy.

Market Type	**Dominant Effective Channel**
Relationship-driven markets	Indonesia, Ukraine (personal contacts)
Platform-driven markets	Romania, Serbia (digital labour platforms)
Visibility-driven markets	Poland (social networks)
Outlier-sensitive case	Spain (requires validation)

Table 27. Acquisition models by country.

To examine how acquisition strategies evolve over professional careers, freelancers were grouped into experience bands: 0–1 years, 1–3 years, 3–5 years, 5–10 years and 10+ years (see Figure 38). Channel usage patterns reveal a clear developmental trajectory as freelancers gain experience:

- Digital labour platform usage increases from 61.7% (0–1 years) to 67.5% (1–3 years) and 80.9% (3–5 years).
- Social network usage also increases, rising from 59.9% to 55.5% and then sharply to 77.6% by the 3–5 year stage.
- In contrast, reliance on personal contacts declines significantly, dropping from 59.3% among newcomers to 38.5% and then 27.6% in mid-career stages.

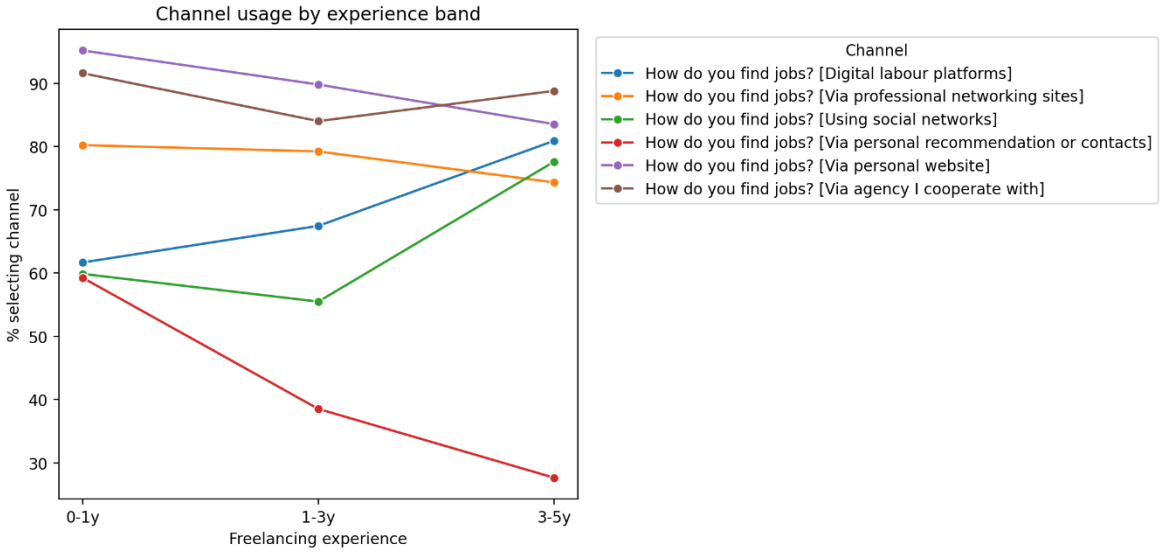


Figure 38. Channel usage patterns by experience band.

This pattern is somewhat counterintuitive relative to common expectations that networks strengthen with experience. However, drawing on Gandini's notion of reputation as a form of capital in digital labour markets (Gandini, 2016), this suggests that early-stage freelancers may initially rely on existing personal relationships before transitioning toward scalable digital acquisition channels.

Most effective channels by experience stage

Applying the same effectiveness proxy within experience bands (requiring n ≥ 40 users per band-channel) reveals an evolving effectiveness structure:

- Early-career freelancers (0–1y and 1–3y): Personal contacts consistently rank among the strongest channels, with platforms and social networks also performing well.

- Mid-career freelancers (3–5y): Personal websites and agencies emerge as the strongest channels according to the client-volume proxy.

This transition is substantively plausible. As freelancers mature professionally, they appear to shift from externally dependent channels toward owned or structured acquisition pipelines, including personal branding assets and institutional intermediaries. Taken together, the findings suggest that freelancer market development follows a progression:

- Entry phase: reliance on personal networks and existing relationships.
- Growth phase: expansion through platforms and social visibility.
- Maturity phase: transition toward owned channels and structured client pipelines.

Importantly, effectiveness varies across countries, indicating that freelancer success strategies are embedded within national digital ecosystems, professional norms, and market maturity levels. These dynamics provide critical context for interpreting differences in communication skills, teamwork practices, and digital literacy outcomes examined in subsequent sections of the ENTEEF analysis.

2.4.3 Digital labour platforms used to find jobs

This subsection examines which digital labour platforms freelancers use to identify work opportunities. Consistent with the survey structure, results are calculated only for respondents who reported using digital labour platforms. In the ENTEEF dataset, 256 of 820 respondents fall into this platform-user subgroup. Accordingly, all frequencies and percentages reported below are calculated relative to n = 256, and cross-country comparisons use the number of platform users within each country as the denominator.

Across countries, platform users show strong evidence of multi-homing, meaning freelancers typically rely on multiple platforms simultaneously rather than a single marketplace (Alasoini, 2023). Consequently, the most analytically meaningful differences do not concern which platforms are used overall, but rather how platform portfolios differ across national contexts.

The clearest cross-country pattern is that most freelancers combine several digital labour platforms, yet the composition of platform portfolios differs most strongly for Upwork, Freelancer.com, and Fiverr (Figure 39). These platforms account for the largest percentage-point gaps between countries and therefore provide the most insight into structural differences between freelancer ecosystems.

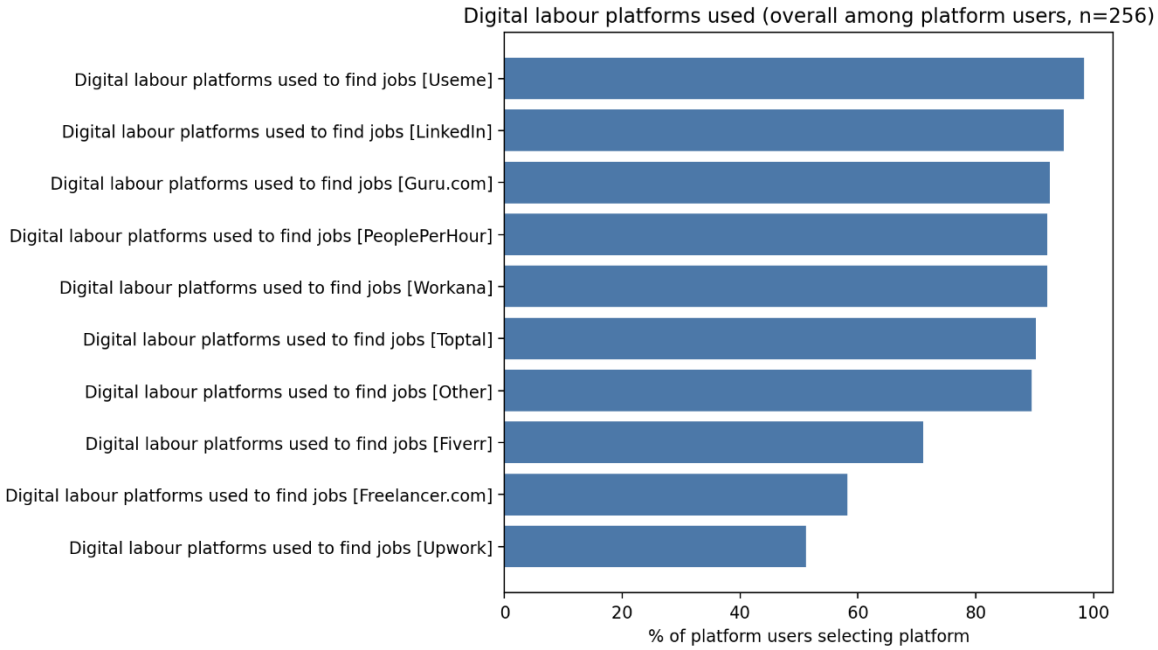


Figure 39. Digital labour platforms usage.

Upwork shows the strongest cross-country variation among platform users. Usage ranges from 21.7% in Spain (10 of 46 platform users) to 73.1% in Ukraine (38 of 52). Serbia also records very high adoption at 71.4% (40 of 56), while Poland is considerably lower at 32.2% (19 of 59). Substantively, this indicates that even when freelancers engage with digital labour platforms, Upwork's role within their platform portfolios varies dramatically. In Ukraine and Serbia, Upwork functions as a central marketplace infrastructure, whereas in Spain and Poland it represents only one option among several.

Freelancer.com also demonstrates substantial variation, particularly between Serbia and Spain. Usage ranges from 45.7% in Spain (21 of 46 platform users) to 85.7% in Serbia (48 of 56). Poland, Romania, and Ukraine occupy intermediate positions, with roughly half of platform users reporting use of the platform. This pattern suggests that

Freelancer.com is considerably more embedded within the Serbian freelancer ecosystem, while Spanish freelancers appear to diversify across alternative acquisition channels.

Fiverr shows meaningful variation, though less extreme than Upwork. The lowest usage among platform users appears in Indonesia at 50.0% (9 of 18). The highest shares occur in Poland (81.4%) and Romania (80.0%), while Spain, Serbia, and Ukraine cluster between approximately 66% and 70%. In practical terms, Fiverr appears broadly adopted across most countries but plays a comparatively less central role among Indonesian platform users.

Several platforms — including Useme, LinkedIn, and other widely adopted services — show consistently high usage across countries. Because adoption levels are relatively uniform, these platforms contribute less to explaining cross-national differences within the platform-user subgroup. Their widespread adoption reinforces the finding that freelancers typically operate across multiple platforms rather than selecting a single dominant marketplace.

Taken together, the findings indicate that platform participation is widespread, but platform ecosystems are nationally differentiated. Even among freelancers who actively use digital labour platforms, the configuration of platform portfolios varies substantially. Three structural patterns emerge:

1. Upwork-centric ecosystems (Ukraine, Serbia), where one major platform plays a dominant coordinating role.
2. Diversified platform portfolios (Spain, Poland), where usage is distributed across multiple marketplaces.
3. Broad adoption with localized variation (Indonesia, Romania), where platforms are widely used but differ in relative importance.

Because platforms differ in reputation systems, workflow structures, communication requirements, and client interaction models, these variations may indirectly influence freelancers' professional practices, digital skill development, and collaboration behaviours.

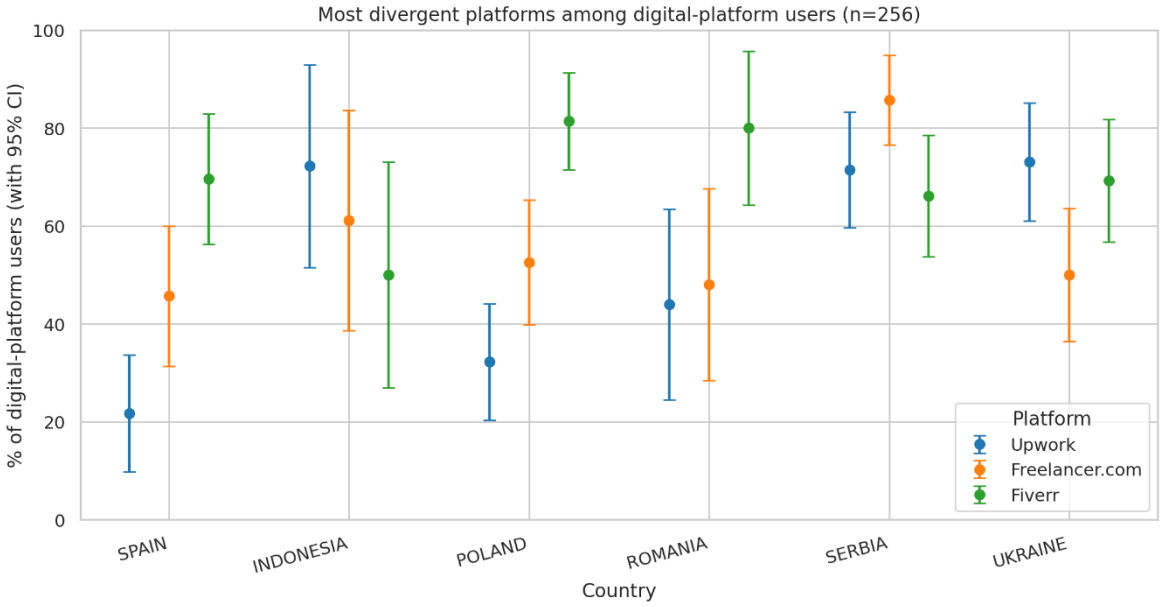


Figure 40. Platform usage among freelancers using digital labour platforms.

Figure 40 presents platform usage among freelancers who reported using digital labour platforms (n = 256). The strongest cross-national variation concerns Upwork (21.7% of platform users in Spain versus 73.1% in Ukraine and 71.4% in Serbia), followed by Freelancer.com (45.7% in Spain versus 85.7% in Serbia). Fiverr is widely used across most countries but comparatively less prevalent among Indonesian platform users (50.0%) relative to Poland (81.4%) and Romania (80.0%). These results indicate that while freelancers commonly multi-home across platforms, the composition of platform portfolios differs markedly across national contexts.

2.4.4 Social networks used to find jobs

This subsection examines which social networking platforms freelancers use to identify work opportunities. The analysis focuses on respondents who reported using social networks to find jobs (FJ_Social_Networks = 1). Restricting the analysis to this subgroup ensures that percentages reflect meaningful behavioural differences among active users rather than the full sample.

In the ENTEEF dataset, n = 324 respondents reported using social networks for job acquisition. All descriptive statistics presented below are therefore calculated relative to this subgroup.

Within the subgroup of freelancers who use social networks to find jobs, platform usage is highly widespread and strongly multi-channel (see Figure 41). Most respondents report relying on several networks simultaneously rather than a single platform.

WhatsApp emerges as nearly universal, used by 98.8% of social-network job seekers, indicating that messaging-based communication functions as a core infrastructure for freelance client interaction and opportunity discovery.

Visual and content-driven platforms also show very high adoption Instagram 83.0% and TikTok 77.8%. These results highlight the importance of visually oriented and algorithm-driven environments in freelance visibility and client acquisition.

Professional and legacy social platforms are used by roughly half of social-network users LinkedIn 52.8% and Facebook 50.6%.

The high share recorded for Other (95.4%) suggests that respondents frequently rely on additional or locally specific platforms beyond those explicitly listed, or that the "Other" category is interpreted broadly within the survey context. This result should therefore be interpreted cautiously as an indicator of platform diversity rather than a single identifiable channel.

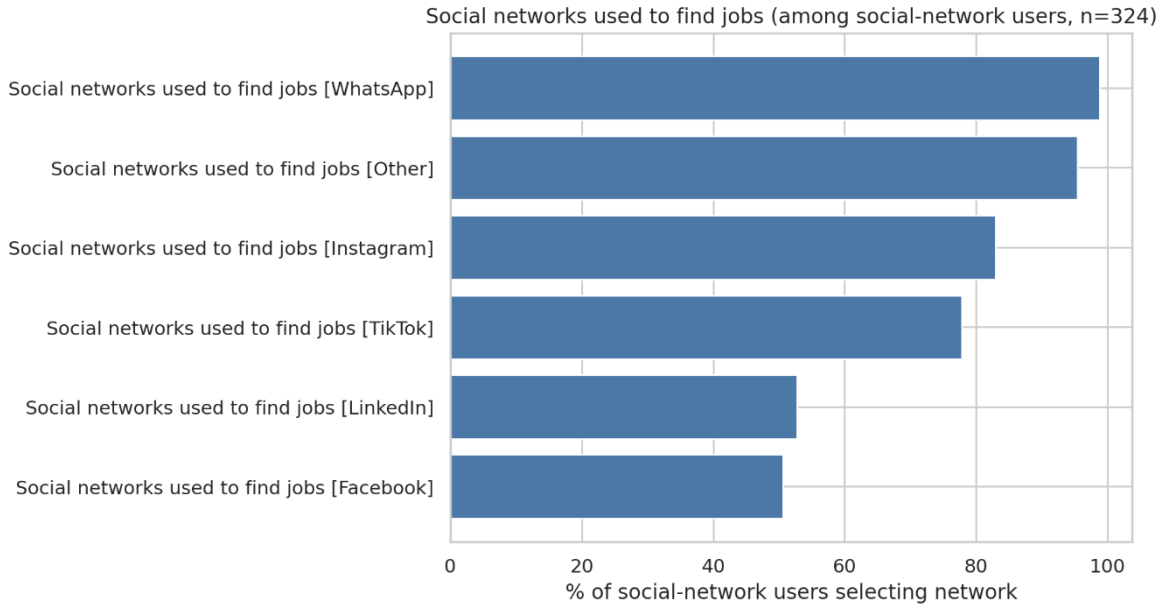


Figure 41. Social networks usage.

Overall, the findings indicate that freelancers who use social networks tend to operate within dense multi-platform ecosystems, combining professional, social, and messaging-based tools.

Cross-Country Patterns Among Social-Network Users

Country-level comparisons reveal meaningful differences in platform preferences, even within the social-network-user subgroup (Figure 42).

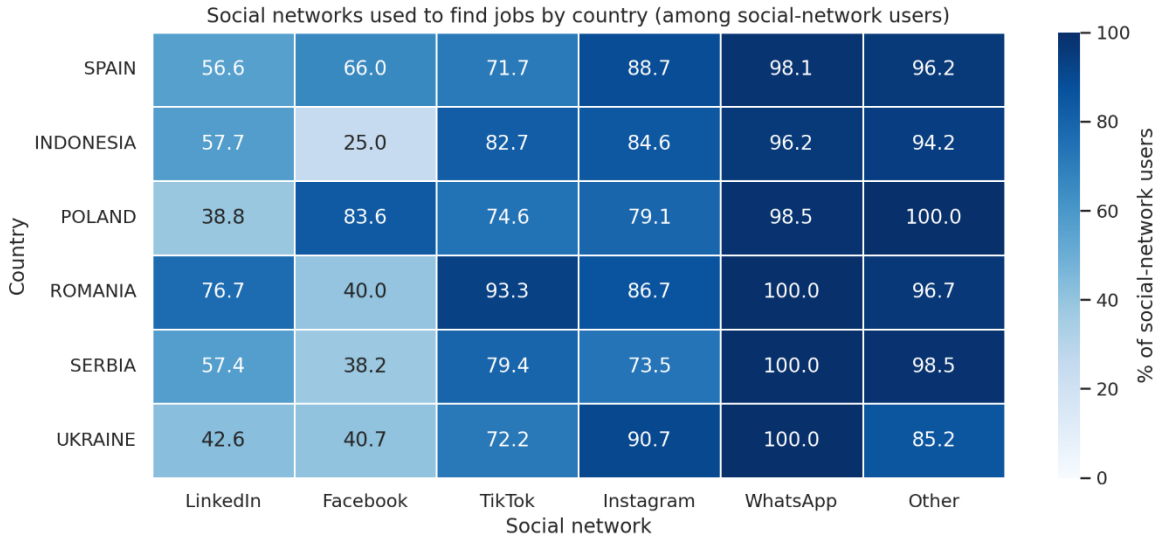


Figure 42. Social network usage by country: A heatmap representation.

Facebook displays one of the largest cross-country contrasts. Usage is particularly high in Poland 83.6% of social-network users and Spain 66.0%. In contrast, adoption is substantially lower in Indonesia 25.0%. This pattern suggests differing generational usage patterns or varying national roles of Facebook as a professional versus personal communication channel.

LinkedIn usage varies notably across countries and reaches its highest level in Romania 76.7% of social-network users. By comparison, usage is lower in Poland, 38.8%. This difference indicates that LinkedIn may function as a more central professional visibility tool in Romania than in some neighbouring freelance markets.

TikTok demonstrates consistently high adoption across countries and peaks in Romania, 93.3%. The widespread use of TikTok suggests growing acceptance of short-form content platforms as channels for professional exposure, branding, or informal client discovery.

WhatsApp usage remains consistently near-universal across all countries (approximately 96%–100% among social-network users). Because variation is minimal, WhatsApp contributes little to explaining cross-country differences; instead, it represents a shared baseline communication infrastructure underpinning freelance interactions.

The results suggest that freelancers' use of social networks is characterized less by platform substitution and more by platform layering, where messaging, professional networking, and content-driven platforms are used concurrently. Cross-country variation is driven primarily by differences in visibility-oriented platforms (Facebook, LinkedIn, TikTok), while messaging platforms such as WhatsApp function as a common operational backbone across markets. These differences may influence how freelancers develop communication skills, manage professional identity, and engage with clients digitally. Markets emphasizing professional networks may encourage formalized communication practices, whereas visually oriented platforms may reward branding, self-presentation, and content creation competencies.

2.4.5 Freelancers' anticipated near-term challenges

This subsection examines freelancers' perceived near-term challenges using a standardized set of survey item. The analysis focuses exclusively on six predefined checkbox challenges, coded as 1 = selected (Yes) and 2 = not selected (No):

- Changes in customer expectations and contracts,
- Market changes that could reduce demand or replace freelancers,
- Securing consistent and constant income,
- Increasing project complexity,
- Need to upskill and keep up with trends,
- Maintaining resilience, discipline, and mindset needed to thrive long-term.

All remaining challenge options in the survey block were grouped into a single category labelled "Other challenges." This category captures respondents who selected any additional items (including AI and automation concerns, competition and client access, economic or regulatory instability, work–life balance or reporting no challenges).

The analytical base includes respondents with at least one valid response across the challenge items (n = 820).

Across the full ENTEEF sample, freelancers' concerns are strongly concentrated around economic stability and market uncertainty, rather than operational or technical issues. The overall ranking of reported challenges is as follows (Figure 43):

- Securing consistent, constant income — 58.7% (n = 481)
- Market changes that could reduce demand or replace freelancers — 51.6% (n = 423)
- Need to upskill and keep up with trends — 44.9% (n = 368)
- Changes in customer expectations and contracts — 36.1% (n = 296)
- Maintaining resilience, discipline, and long-term mindset — 32.7% (n = 268)
- Increasing project complexity — 23.7% (n = 194)
- Other challenges (any selected) — 3.0% (n = 25)

The dominance of income stability and market uncertainty highlights that freelancers' primary concerns relate to predictability of work and structural labour-market risks (Sankararaman, 2024), rather than solely skill or workload challenges.

Figure 43. Anticipated near-term challenges.

Country comparisons, visualized in the accompanying heatmap (Figure 44), show broadly similar priority structures across national contexts. The same core concerns appear consistently across countries, suggesting that freelancers face comparable structural pressures regardless of local market differences. Across countries:

- Income stability remains the most frequently reported challenge in nearly all contexts.
- Market uncertainty and continuous upskilling requirements consistently form the second tier of concerns.
- Challenges related to mindset resilience and changing client expectations occupy a middle position.
- Increasing project complexity is the least frequently selected of the six predefined challenges, indicating that freelancers perceive instability and adaptation pressures as more significant than technical workload escalation.

Figure 44. Anticipated near-term challenges by country: A heatmap representation.

Overall, variation between countries appears moderate rather than structural, reinforcing the interpretation that freelance work shares common systemic challenges across markets.

Because the survey included several additional challenge options beyond the six core items, a separate indicator was created capturing respondents who selected any alternative challenge. This allows evaluation of whether important concerns fall outside the predefined reporting framework. Results show that "Other challenges" are genuinely rare across the dataset:

- Spain: 2.3% (n = 171)
- Indonesia: 4.9% (n = 82)
- Poland: 4.2% (n = 165)
- Romania: 4.6% (n = 108)
- Serbia: 1.2% (n = 164)
- Ukraine: 2.3% (n = 130)

Overall prevalence equals 3.0% (n = 25), with all countries falling within a narrow range of approximately 1%–5%. This confirms that the six predefined challenges capture the overwhelming majority of freelancers' perceived near-term concerns and therefore provide a robust basis for comparative reporting but also that most respondents stick to the predetermined boxes and very few select anything else.

The results point to three overarching dimensions shaping freelancers' near-term outlook:

1. Economic Security - income stability and demand uncertainty dominate freelancer concerns, underscoring the inherently volatile nature of freelance labour markets.
2. Adaptation Pressure - nearly half of respondents highlight the need to continuously upskill, reflecting rapid technological and market change.
3. Psychological Sustainability - a substantial share report challenges related to maintaining resilience and long-term motivation, emphasizing the individual responsibility embedded in freelance careers.

Importantly, technical complexity ranks lower than economic and adaptive pressures, suggesting that freelancers perceive market conditions rather than task difficulty as the primary source of risk.

Spain is relatively low on upskilling (35.1% vs 44.9% overall) and lower on resilience/mindset (27.5% vs 32.7%). It is one of the higher countries on increasing project complexity (28.1% vs 23.7%). The two biggest challenges still sit at the top, but Spain looks a bit more "project/complexity" and less "skills race".

Indonesia stands out as high across several "change pressure" items. It is notably higher on market changes reducing demand/replacing freelancers (64.6% vs 51.6%) and also higher on changes in customer expectations/contracts (46.3% vs 36.1%). It is also higher on upskilling (51.2% vs 44.9%) and resilience/mindset (41.5% vs 32.7%). Net interpretation: Indonesia looks like the country where people most anticipate external change and the need to adapt personally.

Poland shows a strong emphasis on market change (55.8%, above overall), but it is lower on customer expectations/contracts (30.3% vs 36.1%), upskilling (37.0% vs 44.9%), and resilience/mindset (24.8% vs 32.7%). It is close to average on project complexity (23.6% ~ overall). Net interpretation: Poland's pattern is more "macro market risk" than "personal capability strain".

Romania is high on customer expectations/contracts (47.2% vs 36.1%) and high on market changes (59.3% vs 51.6%). It is also above average on upskilling (50.0%) and resilience/mindset (38.9%). But it is lower on consistent income (49.1% vs 58.7%) and lower on project complexity (17.6% vs 23.7%). Net interpretation: Romania looks "adaptation-driven" (clients/market/skills) more than "income/complexity-driven".

Serbia is the clearest outlier on income stability. It is the highest on To secure consistent, constant income (69.5% vs 58.7%), while being the lowest on market changes reducing demand (39.0% vs 51.6%). It is also lower on customer expectations/contracts (28.0% vs 36.1) and low on project complexity (16.5%). Net interpretation: Serbia's heatmap reads as "the problem is steady money and pipeline," not so much market disruption or project complexity.

Ukraine's challenge profile broadly aligns with the overall ENTEEF pattern but shows notable intensification in skill adaptation and work complexity pressures relative to the pooled sample. The most frequently reported challenge among Ukrainian freelancers is securing consistent, constant income, selected by 63.8% of respondents, which is 5.1% higher than the overall average of 58.7%. This confirms that income stability remains the dominant concern, consistent with cross-country trends. However, Ukraine diverges most clearly in challenges related to professional adaptation. The need to upskill and keep up with trends is reported by 55.4% of Ukrainian freelancers, representing a +10.5% difference compared with the overall rate of 44.9%. Similarly, increasing project complexity is selected by 33.8%, which is +10.1% above the overall average of 23.7%. These gaps suggest that Ukrainian freelancers experience stronger pressures associated with evolving technical requirements and changing skill expectations. Other challenges remain closely aligned with overall patterns. Maintaining resilience, discipline, and long-term mindset is reported by 33.8%, only slightly above the overall level (32.7%, +1.1%), while changes in customer expectations and contracts appear nearly identical to the overall distribution (36.2% vs. 36.1% overall). By contrast, concern about market changes that could reduce demand or replace freelancers is marginally lower in Ukraine (50.0%, −1.6% relative to the overall 51.6%).

Overall, the distribution of anticipated challenges suggests that freelancers primarily perceive securing consistent, constant income and market changes that could reduce demand or replace us as the most pressing near-term issues, followed by the need to upskill and keep up with trends, changes in customer expectations and contracts, maintaining resilience, discipline, and the mindset needed to thrive long-term, and increasing project complexity.

These findings provide essential context for the subsequent analysis of competence gaps and training needs because they point to a workforce that is navigating both immediate economic pressure and structural shifts in how work is won and delivered. In practical terms, that means the competence conversation should not only focus on technical upskilling, but also on adaptability (responding to shifting demand and evolving client expectations) and sustainable professional development (building

routines, resilience, and long-term capability growth that help freelancers remain competitive and financially stable).

2.4.6 Drivers of freelancing growth as perceived by freelancers

This subsection examines freelancers' perceptions of the main factors driving the growth of freelancing. The survey question was structured as a multi-select item (maximum three selections), coded 1 = selected and 2 = not selected. Results are calculated among respondents who provided at least one valid response across the driver items (base n = 820). Because respondents could select only three options, percentages are interpreted as relative emphasis rather than absolute importance. Higher endorsement of one driver necessarily reduces the likelihood of selecting others. Accordingly, comparisons are best understood as indicating which explanatory narrative dominates within each country context.

Across the ENTEEF sample, freelancers most frequently attribute the expansion of freelancing to organizational demand for flexibility rather than purely individual motivations (Figure 45).

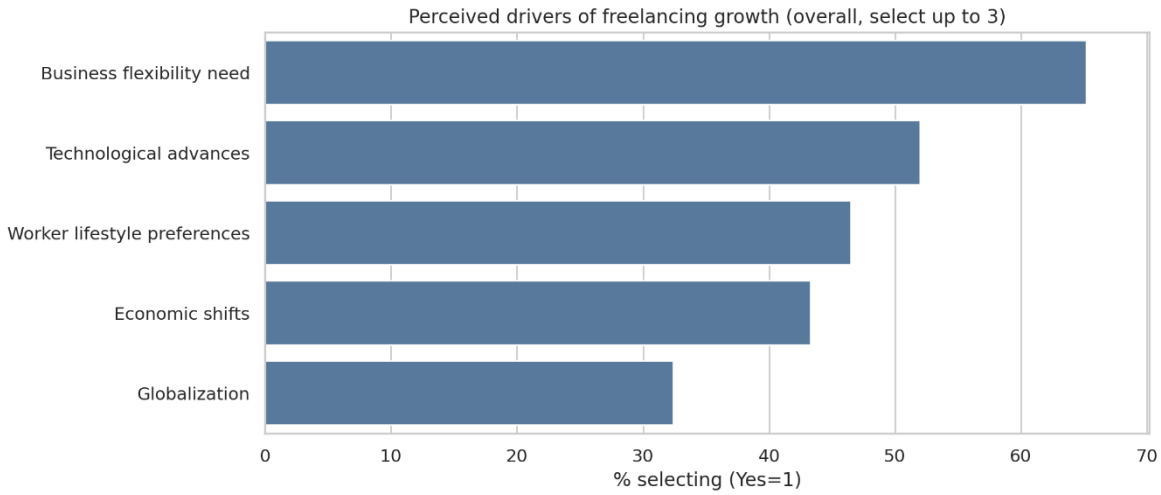


Figure 45. Drivers perceived of freelancing growth.

The overall ranking of perceived growth drivers is the following:

- Business flexibility need — 65.2% (n = 535)
- Technological advances — 52.0% (n = 426)

- Worker lifestyle preferences — 46.5% (n = 381)
- Economic shifts — 43.3% (n = 355)
- Globalization — 32.4% (n = 266)

Aligned with the views of Zeid et al. (2024), these results suggest that freelancers view market expansion primarily as a structural transformation in how organizations source skills, supported — but not solely caused — by technological change.

The accompanying heatmap (Figure 46) presents, for each country, the percentage of respondents selecting each driver. Because selections were limited to three options, country differences should be interpreted as differences in dominant framing rather than differences in perceived overall importance.

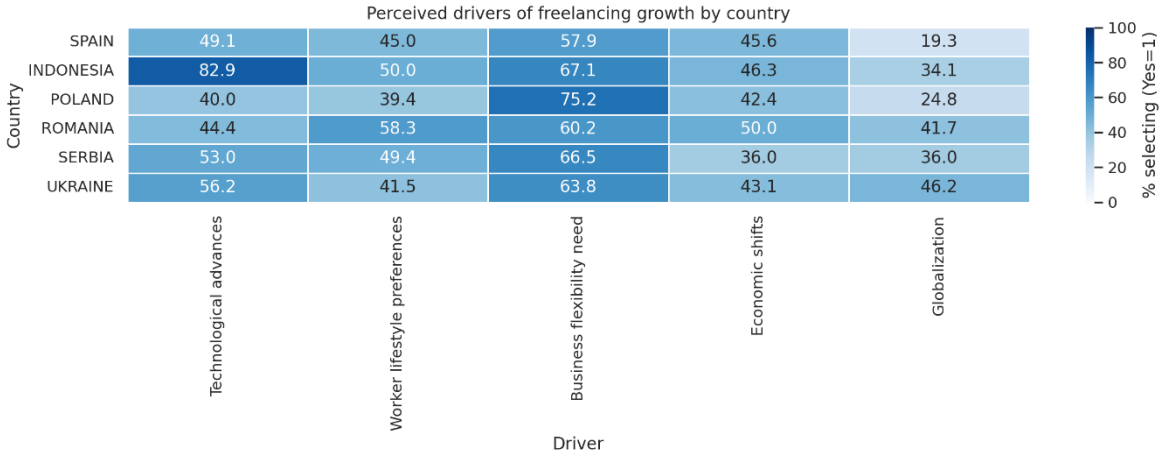


Figure 46. Perceived drivers of freelancing growth, by country: A heatmap representation.

The comparison allows identification of whether freelancing growth is locally understood as primarily:

- Business-driven — organizations seeking flexibility and project-based talent,
- Technology-driven — expansion enabled by platforms, digital tools, and remote work infrastructure,
- Lifestyle-driven — worker preferences for autonomy and independence,
- Macro-driven — broader economic restructuring,
- Global-market-driven — cross-border integration and globalization.

Even where rankings appear broadly similar across countries, variation in relative emphasis provides important contextual insight for policy and program design.

Firstly, freelancing growth is perceived as structurally demand-driven. The dominance of business flexibility need (65.2%) indicates that freelancers interpret market expansion primarily as a response to organizational change rather than individual lifestyle choice alone (Zeid et al., 2024). Firms increasingly externalize skills and adopt project-based work arrangements. Interventions should emphasize freelancer professionalization, including service packaging, contracting literacy, project management capability, and client relationship management.

Secondly, technology functions is a foundational enabler rather than the primary driver. Although technological advances (52.0%) rank second, they do not surpass business demand factors. This suggests freelancers view technology as an enabling infrastructure rather than the sole cause of freelancing growth. Training programs should treat digital tools as baseline competencies while prioritizing capabilities that convert technological access into sustainable income — such as positioning, sales pipelines, delivery quality, and repeatable workflows.

The combined prominence of technological, lifestyle, and economic drivers indicates a labour market characterized by rapid change in both work organization and worker expectations (Zeid et al., 2024). Freelancers operate in environments requiring ongoing adjustment to evolving client needs and competitive pressures. These findings strongly support subsequent analysis of competence gaps and training needs, particularly around adaptability, lifelong learning practices, and professional resilience. While the same five drivers appear across all countries, the heatmap typically reveals different national emphases. This suggests that effective policy responses should maintain a consistent core framework while adapting communication and implementation locally. Recommended positioning strategies include:

- Economic-shift emphasis: focus on income stability, diversification strategies, and client acquisition skills.
- Technology emphasis: highlight productivity tools, digital workflows, and quality differentiation.

- Lifestyle emphasis: support sustainable work routines, boundary-setting, and long-term career planning.
- Globalization emphasis: prioritize cross-border readiness, pricing strategies, negotiation practices, and intercultural communication norms.

Across all countries, Business flexibility need is either the top driver or near the top (range roughly 57.9% to 75.2%). This is the most consistent cross-national signal, and it matters strategically because it means freelancers perceive growth as being pushed by client/firm behaviour, not only by worker preferences. Freelancing growth is widely understood as a response to project-based work, variable demand, and the outsourcing of specialized tasks.

Tech is the major differentiator between "platform/remote-first" and "market-structure-first" stories. Indonesia is the clearest "tech-first" case (very high tech driver), and Ukraine/Serbia also lean tech-enabled. Poland is the outlier where tech is relatively less emphasized and the story is more about organizational flexibility. This is useful because "tech as driver" typically implies higher perceived relevance of tool adoption, digital workflows, and platform dynamics in shaping opportunity.

Lifestyle preferences peak in Romania (and are also strong in Serbia/Indonesia). Romania's high lifestyle signal suggests a stronger perception that freelancing growth is also about autonomy and self-directed career choices, not just market pressures. Where lifestyle is high, the ecosystem narrative tends to favour themes like work-life balance, independence, and flexible identity-based career paths.

Globalization splits countries into low vs high cross-border orientation. Spain and Poland show low globalization perceptions, while Ukraine and Romania show high. Indonesia and Serbia sit mid. This is an important strategic segmentation: where globalization is seen as a driver, freelancers are more likely to frame success around international clients, cross-cultural communication, and competing in global marketplaces.

Across the national contexts, freelancers consistently view the growth of freelancing as being driven foremost by business demand for flexibility, with technological advances acting as a critical enabler whose perceived importance varies

by country. In some contexts (notably Indonesia, and to a lesser extent Ukraine and Serbia), the growth narrative is strongly technology-led, emphasizing digital tools and remote collaboration as the foundation for independent work. In others (particularly Poland), the growth story is more clearly tied to organizational and labour-market restructuring toward project-based, flexible engagement. Lifestyle preferences emerge as a particularly strong component in Romania, suggesting that in this context the expansion of freelancing is also interpreted as an expression of autonomy, work–life balance, and self-directed career paths. Finally, perceived globalization effects differ sharply: Ukraine and Romania show a stronger association between freelancing growth and international market access, while Spain and Poland interpret growth more as a domestically anchored phenomenon.

2.4.7 Freelancers' perceptions of the future of freelancing

This section assesses freelancers' expectations regarding the future of freelancing across the six participating countries. Respondents evaluated their outlook using a five-point scale ranging from very optimistic to very pessimistic. Lower response values therefore correspond to a more optimistic outlook. The analysis is based on the full analytical sample of 820 respondents.

For comparative purposes, responses were grouped into three analytical categories: optimistic (very or somewhat optimistic), neutral, and pessimistic (somewhat or very pessimistic). In addition, the mean response score is used as a summary indicator of sentiment, where lower averages indicate stronger optimism. At the aggregate level, freelancers' expectations about the future are clearly more positive than negative, although a sizeable proportion of respondents remain undecided. Across the full ENTEEF sample, 59.0% of freelancers express optimism, while 29.4% adopt a neutral position and only 11.6% report pessimistic expectations. The detailed distribution shows that 23.3% of respondents are very optimistic and 35.7% somewhat optimistic, compared with 10.6% somewhat pessimistic and only 1.0% very pessimistic (Figure 47).

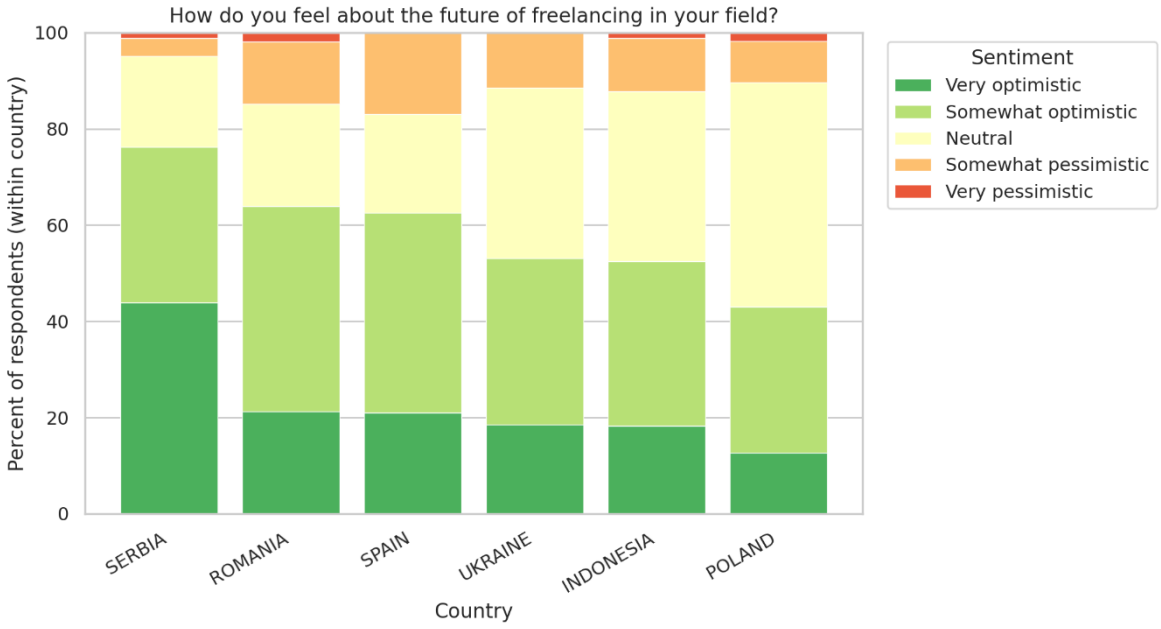


Figure 47. Future expectations by country.

These findings indicate that confidence in the future of freelancing is widespread, but not universal. A substantial middle group suggests that many freelancers perceive both opportunities and uncertainties shaping the sector's evolution. Overall, the sentiment landscape can therefore be characterized as cautiously positive, combining broad optimism with measurable uncertainty.

Although optimism dominates overall, meaningful differences emerge across countries, revealing distinct national sentiment profiles (Figure 48).

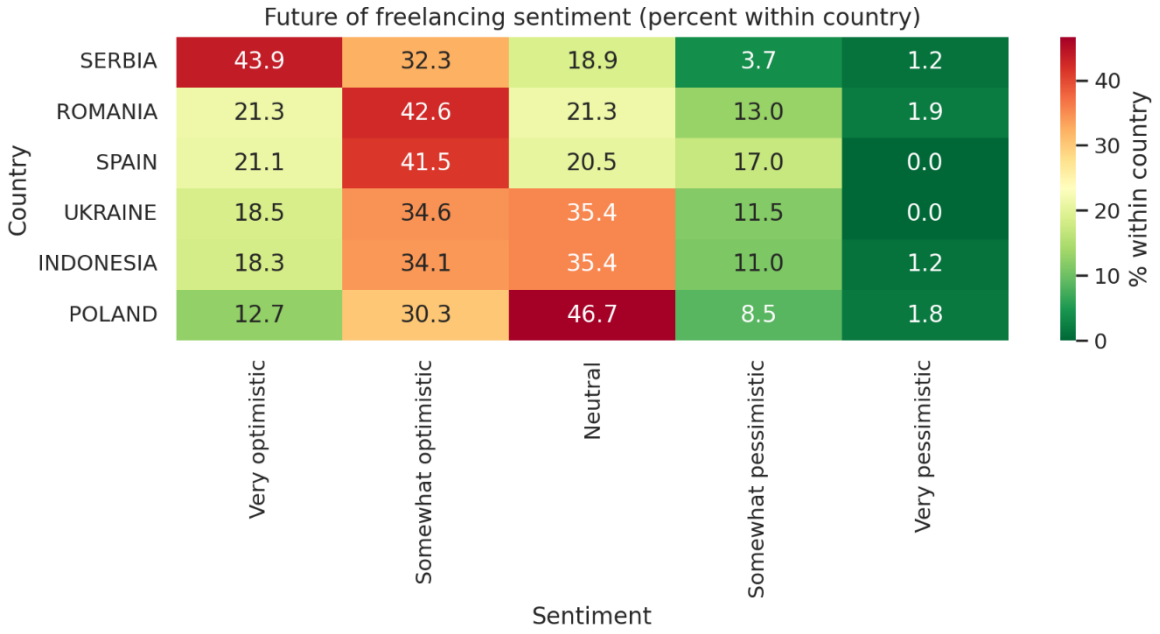


Figure 48. Future expectations, by country: A heatmap representation.

Serbia stands out as the most optimistic country in the dataset. A total of 76.2% of Serbian freelancers report optimistic expectations, compared with only 4.9% expressing pessimism, while 18.9% remain neutral. The country records the lowest mean sentiment score (1.86), confirming the strongest positive outlook among all countries analysed. This result is driven primarily by an exceptionally high proportion of very optimistic respondents (43.9%), combined with minimal negative sentiment. The Serbian freelance population therefore demonstrates strong confidence in the sustainability and future expansion of freelance work opportunities.

Romania and Spain both display optimism levels above the overall average, yet their sentiment distributions reveal greater internal variation.

In Romania, 63.9% of freelancers are optimistic, 21.3% neutral, and 14.8% pessimistic, producing a mean score of 2.31. Spain shows a very similar optimism level, with 62.6% optimistic, 20.5% neutral, and 17.0% pessimistic, resulting in a mean score of 2.33.

Spain is particularly notable because strong optimism coexists with one of the largest pessimistic segments in the sample. This combination suggests a more polarized perception of freelancing, where positive experiences among some freelancers are offset by uncertainty or challenges faced by others.

Poland represents the least optimism-leaning country, though not the most pessimistic. Instead, Polish freelancers display a predominantly cautious stance. Only 43.0% report optimism, while 46.7% select a neutral outlook, the highest neutral share among all countries. Pessimism remains relatively limited at 10.3%, but the overall mean score (2.56) is the highest observed, indicating comparatively weaker optimism. This pattern suggests hesitation rather than dissatisfaction, with freelancers appearing uncertain about future developments rather than overtly negative.

Ukraine and Indonesia occupy an intermediate position with remarkably similar sentiment structures. In Ukraine, 53.1% of freelancers are optimistic, 35.4% neutral, and 11.5% pessimistic, producing a mean score of 2.40. Indonesia shows almost identical proportions, with 52.4% optimistic, 35.4% neutral, and 12.2% pessimistic, and a mean score of 2.43. In both countries, optimism exists but is moderated by relatively large neutral groups, indicating cautious expectations rather than strong confidence or concern.

Country-level distributions further illustrate how optimism is expressed differently across contexts. Serbia combines very high optimism with minimal pessimism, Romania and Spain display optimistic yet more divided outlooks, while Poland, Ukraine, and Indonesia show larger shares of undecided respondents. These variations suggest that freelancers' expectations are shaped not only by individual attitudes but also by broader market and institutional conditions influencing perceived stability and opportunity.

Taken together, three broad sentiment patterns emerge across the ENTEEF countries:

- Serbia represents a high-confidence freelance environment, characterized by strong expectations of future opportunity.
- Romania and Spain illustrate optimistic but uneven markets, where positive outlooks coexist with notable concern among segments of freelancers.
- Poland, Ukraine, and Indonesia reflect cautious or transitional environments, where uncertainty remains relatively high despite limited pessimism.

Overall, freelancers view the future of freelancing positively, but optimism is moderated by structural concerns identified elsewhere in the analysis, particularly income stability and evolving market conditions. The presence of a large neutral segment across several countries indicates that expectations remain sensitive to economic context and professional sustainability rather than firmly settled.

Across the ENTEEF sample (n = 820), freelancers' outlook is predominantly optimistic, with 59.0% expressing positive expectations, 29.4% remaining neutral, and 11.6% pessimistic. Serbia emerges as the most optimistic country (76.2% optimistic; mean = 1.86), while Poland shows the most neutral profile (46.7% neutral; mean = 2.56). Romania and Spain remain broadly optimistic but more polarized, whereas Ukraine and Indonesia demonstrate cautious optimism characterized by sizeable, undecided groups.

Explaining Differences in Freelancers' Optimism About the Future

Earlier sections of the analysis revealed clear cross-country differences in freelancers' expectations regarding the future of freelancing. Serbia emerged as the most optimistic market, while Poland displayed the most neutral — or least optimism-leaning — profile. The purpose of this section is to move beyond description and examine what may explain these differences. The analysis investigates whether variations in optimism are primarily associated with national context, occupational composition, individual characteristics, or structural features of freelance markets and demand conditions. The objective is explanatory rather than causal: identifying factors plausibly linked to optimism differences across and within countries.

A hypothesis considered whether optimism increases in more mature freelance ecosystems. More developed markets might offer freelancers greater stability through repeat clients, scalable work pipelines, diversified sourcing channels, and stronger international demand. To test this idea using available data, several proxy indicators were constructed, including the use of digital labour platforms, the number of clients reported in the past twelve months, and the breadth of client acquisition channels used. Empirical results show that platform reliance itself is not associated with higher optimism at the country level. A composite maturity index combining platforms, client volume, and sourcing diversity shows only a weak positive relationship with optimism

and remains statistically inconclusive. These findings suggest that participation in platforms alone does not explain why freelancers in some countries feel more optimistic than others.

Freelancers' expectations may also be influenced by institutional factors that shape the perceived sustainability of independent work. These include taxation regimes for self-employed workers, administrative barriers to freelancing, access to social protection systems, and the reliability of contract enforcement and payment practices. While such variables were not directly measured in the survey, they represent plausible contextual drivers that could explain cross-country differences. Incorporating policy indicators or qualitative institutional assessments would therefore represent a valuable next analytical step.

Country differences in optimism may also arise from composition effects. If a country's freelancer population is concentrated in rapidly expanding sectors such as ICT or digital services, aggregate optimism may appear higher even when optimism levels within individual sectors are similar.

A robustness test examined country rankings within specific freelancer activity groups. Using activity-country cells with sufficient observations, rank correlations between overall and activity-specific country patterns ranged between $\rho \approx 0.40$ and 0.50. Although these results are not statistically conclusive due to small sample sizes, they suggest moderate consistency rather than complete reversal of country patterns. This indicates that optimism differences are not purely driven by sectoral composition, though larger samples would allow stronger validation.

Another plausible explanation relates to client geography. Freelancers working with international clients or earning income in stronger currencies may experience greater confidence, particularly in economically volatile domestic contexts. Although this factor was not directly measured in the current dataset, existing freelance labour research identifies cross-border demand exposure as an important determinant of perceived opportunity. To test whether national differences simply reflect sector composition, a fixed-effects modelling approach was applied, estimating optimism as a function of both country and activity field. Results indicate that country effects remain after controlling for subfield, suggesting that optimism differences reflect broader

contextual influences rather than only occupational structure. This finding supports interpreting optimism primarily as a country-level phenomenon.

The analysis also examined whether demographic characteristics explain variation in optimism. Optimism was recoded into an intuitive scale (optimism_score = 6 − Future_Freelancing), where higher values indicate greater optimism. Correlation analysis shows essentially no relationship between optimism and demographic factors:

- Age and optimism: $\rho = -0.016$ ($p = 0.654$)
- Education and optimism: $\rho = -0.018$ ($p = 0.611$)

Regression models controlling for country confirm the same conclusion. The estimated effects are extremely small, with age associated with a change of only −0.013 optimism points per year and education −0.0057 points per education level, both substantively negligible. These results indicate that optimism differences are not explained by demographic characteristics.

Testing the Market-Maturity Hypothesis

At the country level, correlations between platform usage and average optimism are effectively zero (Spearman $r = -0.143$; Pearson $r = 0.064$). A broader maturity index combining platforms, client volume, and channel breadth shows a weak positive relationship but lacks statistical strength given the small number of countries.

A more reliable test compares freelancers within the same country. Fixed-effects models reveal that platform usage has no detectable association with optimism ($p = 0.809$). In contrast, client volume shows a modest positive relationship: a higher logged client count is associated with an estimated +0.057 increase in optimism score ($p \approx 0.11$). Although not statistically definitive, this relationship is consistently stronger than any platform-related effect.

The key implication is that freelancers with larger or more stable client portfolios tend to feel slightly more optimistic, whereas simply using platforms does not influence outlook.

What actually drives optimism?

Taken together, the evidence points to a consistent conclusion. Differences in optimism are not meaningfully explained by age, education, or platform participation. Instead, optimism appears primarily associated with contextual conditions and perceived demand stability. Freelancers' expectations are shaped less by how they work and more by how secure and sustainable their client pipeline feels. Country-level environments and market opportunity structures therefore play a larger role than individual characteristics.

The findings carry several implications for policy and program design:

4. Optimism should be understood as largely structural rather than demographic, meaning that national context matters more than individual attributes.
5. Demand stability emerges as more important than platform access; having consistent clients is linked more closely to confidence about the future than simply participating in digital marketplaces.

Institutional and policy environments likely exert additional influence that remains partially unobserved in the dataset. Consequently, training interventions alone are unlikely to eliminate optimism gaps between countries. Skills development initiatives should be complemented by ecosystem-level measures that improve market access, income predictability, and professional security.

Differences in freelancers' optimism across countries are not explained by age, education, or platform participation. Instead, optimism appears primarily associated with contextual factors and perceived demand stability. Within countries, freelancers with larger client portfolios tend to report slightly higher optimism, indicating that confidence in the future of freelancing is shaped more by market opportunity and income security than by demographic characteristics or platform use alone.

2.4.8 Freelancers' expected future use of AI

This section examines freelancers' expectations regarding their future use of AI in professional activities. Respondents were asked how often they expect to use AI in their freelance work over the next five years. The response scale included five

categories: Never, Rarely, Occasionally, Often, and Regularly. The analysis is based on 820 valid responses, with no missing data, ensuring full comparability across countries.

Across the ENTEEF sample, freelancers anticipate substantial integration of AI into their future work practices. Expectations are strongly skewed toward frequent usage rather than limited or experimental adoption (Figure 49).

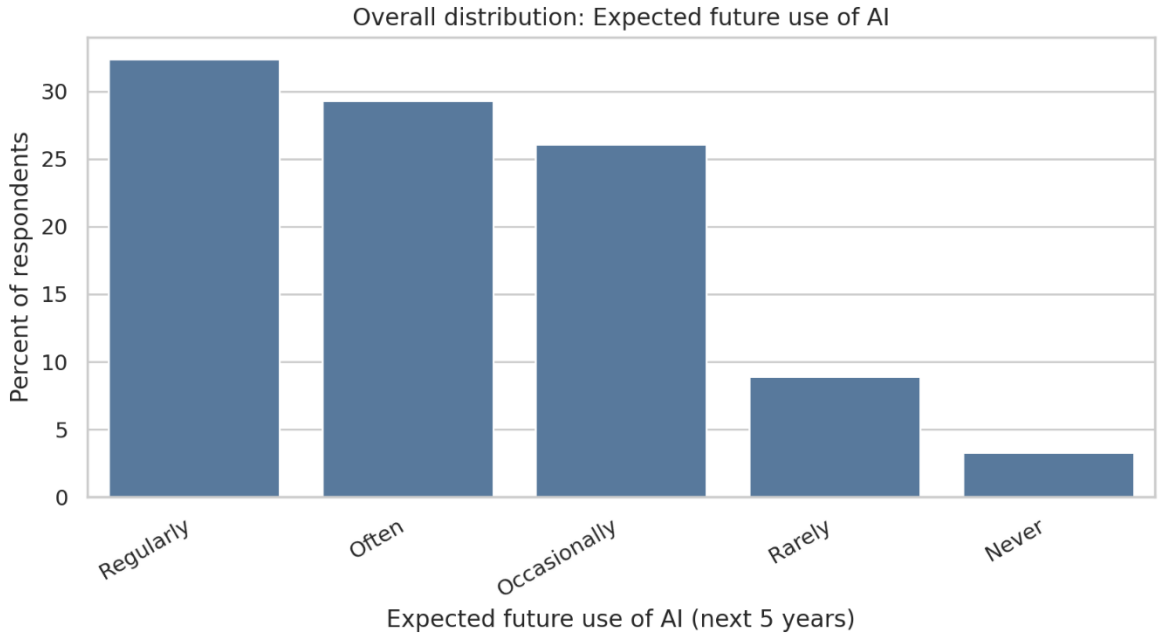


Figure 49. Expected future use of AI.

Approximately 32.4% of respondents (n = 266) expect to use AI regularly, while 29.3% (n = 240) anticipate using it often. A further 26.1% (n = 214) foresee occasional use. By contrast, relatively small shares expect minimal engagement, with 8.9% (n = 73) indicating rare use and only 3.3% (n = 27) reporting that they expect never to use AI. Taken together, 61.7% of freelancers expect frequent AI use (often or regularly), and 87.8% anticipate at least occasional use within the next five years.

These findings indicate that AI is widely perceived not as a niche technology but as a mainstream component of future freelance work. Overall, the data suggest that freelancers broadly expect AI to become embedded in professional workflows rather than remaining an optional or experimental tool.

Although expectations of AI adoption are high in all countries, the intensity of anticipated use varies considerably across national contexts, particularly in the share of freelancers expecting to use AI regularly (Figure 50).

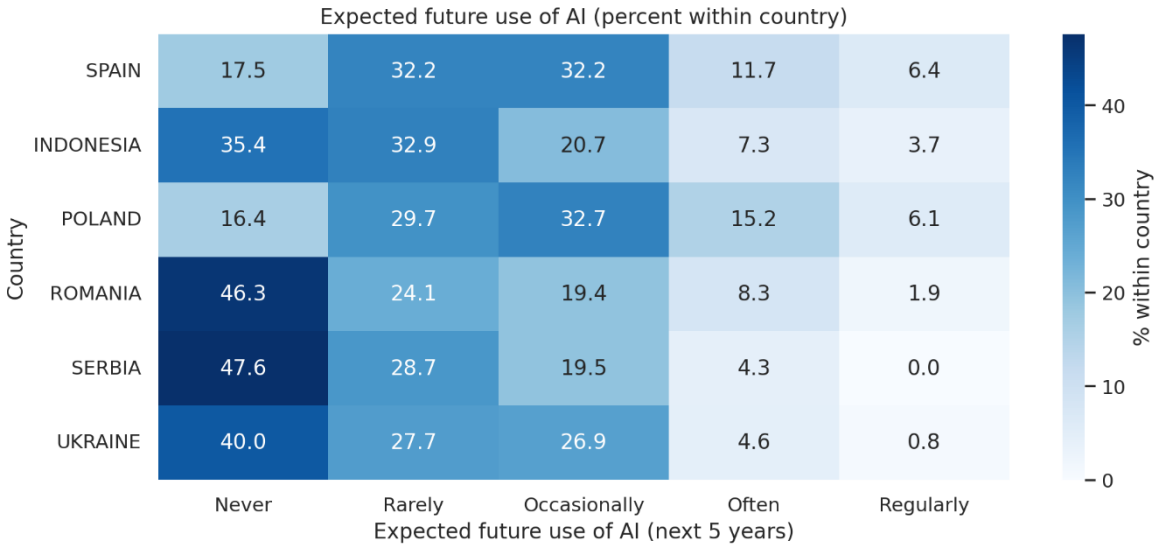


Figure 50. Expected use of AI: A heatmap representation.

Serbia emerges as the least AI-forward market. Nearly half of Serbian freelancers (47.6%) expect never to use AI, accompanied by 28.7% anticipating rare use and 19.5% occasional use. Only 4.3% expect often use and none report regular use AI.

Romania shows a similarly orientation toward AI adoption. 46.3% expect never to use and 24.1% rare use, while 19.4% anticipate occasional engagement. Only 8.3% indicating often use and 1.9% expecting regular use.

40.0% of Ukrainian respondents anticipate never to use AI, 27.7% rare use, and 26.9% occasional use.

Indonesia occupies a mid-to-high position. 35.4% expect never to use and 32.9% rare use, while 20.7% anticipate occasional use. A slightly larger minority expects limited engagement, with 7.3% selecting often use and 3.7% indicating regular use.

In contrast, Spain and Poland shows a more optimistic outlook toward AI adoption. Only 17.5% and 16.4% expect never to use respectively in Spain and Poland — the lowest share among all countries — while 11.7% and 15.2% anticipate frequent use and 32.2% and 32.7 expect occasional use.

Across countries, expected AI adoption follows a clear gradient. Spain and Poland represent highly AI-forward environments characterized by strong expectations of regular usage. Ukraine and Indonesia reflect broadly positive but more gradual adoption trajectories, while Serbia and Romania appear comparatively cautious, with freelancers expecting AI to complement rather than dominate future work practices. Despite these differences, a common pattern remains: in every country, the majority of freelancers anticipate using AI at least occasionally. The variation therefore concerns intensity of adoption, not acceptance itself.

Similarly to recent reports and studies (Gmyrek et al., 2025; OECD, 2025), the findings indicate that freelancers widely perceive AI as a transformative force shaping future work. High expected adoption aligns with earlier results highlighting continuous upskilling pressures and evolving project complexity as key challenges. Countries with stronger expectations of regular AI use may anticipate greater productivity gains or competitive advantages, whereas more cautious markets may face slower adaptation processes. From a strategic perspective, these results suggest that AI readiness will likely become a differentiating factor in freelancer competitiveness. Training and support initiatives should therefore focus not only on technical familiarity with AI tools but also on integrating AI into workflows, service delivery models, and client collaboration practices.

Across the ENTEEF sample (n = 820), freelancers expect substantial growth in AI usage over the next five years, with 61.7% anticipating frequent use and 87.8% expecting at least occasional use.

Serbia and Romania emerge as the most AI-forward countries, each with nearly half of freelancers expecting regular AI use, while Spain displays the most cautious outlook, with the lowest regular-use share (17.5%) and the highest proportion expecting no AI use (6.4%). Overall, freelancers view AI not as an emerging niche technology but as a central component of future freelance work.

2.4.9 Investment in upskilling and reskilling by freelancers

This section examines how frequently freelancers invest in upskilling and reskilling as part of their professional development. Investment frequency was measured on a

five-point scale (1 = Regularly, 2 = Often, 3 = Occasionally, 4 = Rarely, 5 = Never), where lower values indicate more frequent engagement. The analysis covers the full sample of 820 respondents, with no missing data, allowing full cross-country comparability (Figure 51).

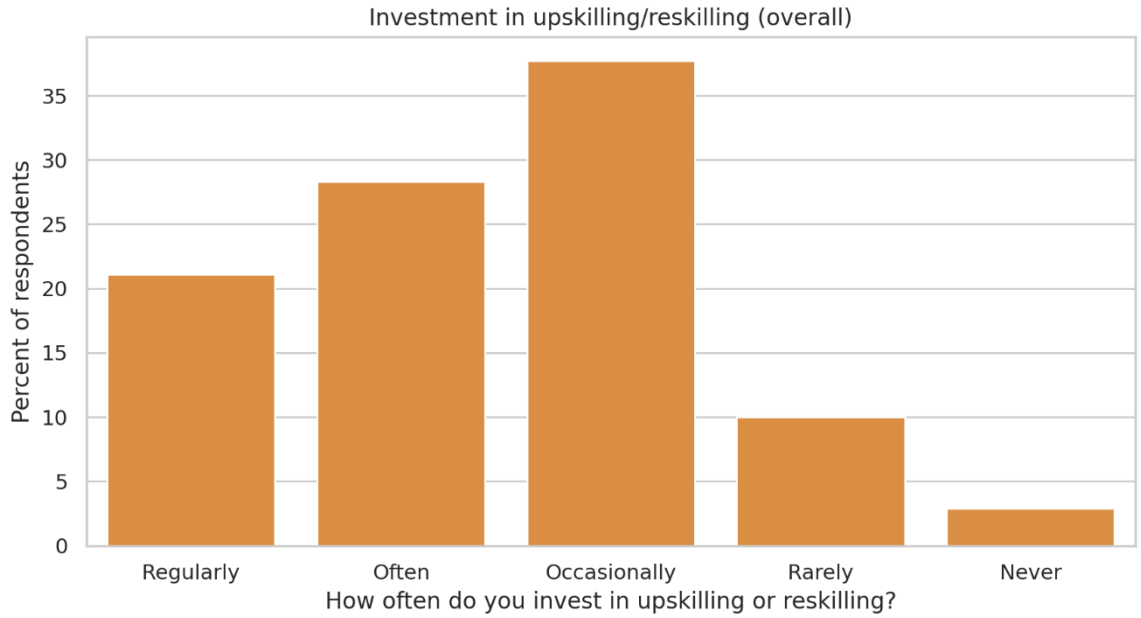


Figure 51. Investment in upskilling/reskilling.

Across countries, freelancers demonstrate a strong commitment to continuous learning. Most report investing in skills development at least periodically, with Occasionally representing the modal response. Overall, 21.1% invest regularly, 28.3% often, and 37.7% occasionally, while only 10.0% invest rarely and 2.9% never. In aggregate, 86.1% engage in upskilling at least occasionally, compared with 12.9% who rarely or never invest. The mean score of 2.45 (SD = 1.02, IQR = 1) places typical behaviour between often and occasionally, indicating that continuous learning is broadly embedded in freelance professional practice rather than representing an exceptional activity. This pattern aligns with earlier findings highlighting ongoing adaptation pressures and the need to respond to technological and market change.

Although participation in upskilling is widespread, differences emerge in the intensity of investment across countries (see Figure 52, Figure 53). Romania and Serbia show the strongest engagement. In Romania, 30.6% invest regularly and 35.2% often,

meaning nearly two-thirds report frequent learning activity. Serbia displays a comparable profile, with 29.3% investing regularly and 22.6% often. Quartile analysis confirms this pattern: both countries have Q1 = Regularly, Median = Often, and Q3 = Occasionally (IQR = 2), indicating a distribution shifted toward more frequent investment and a learning culture oriented toward continuous improvement.

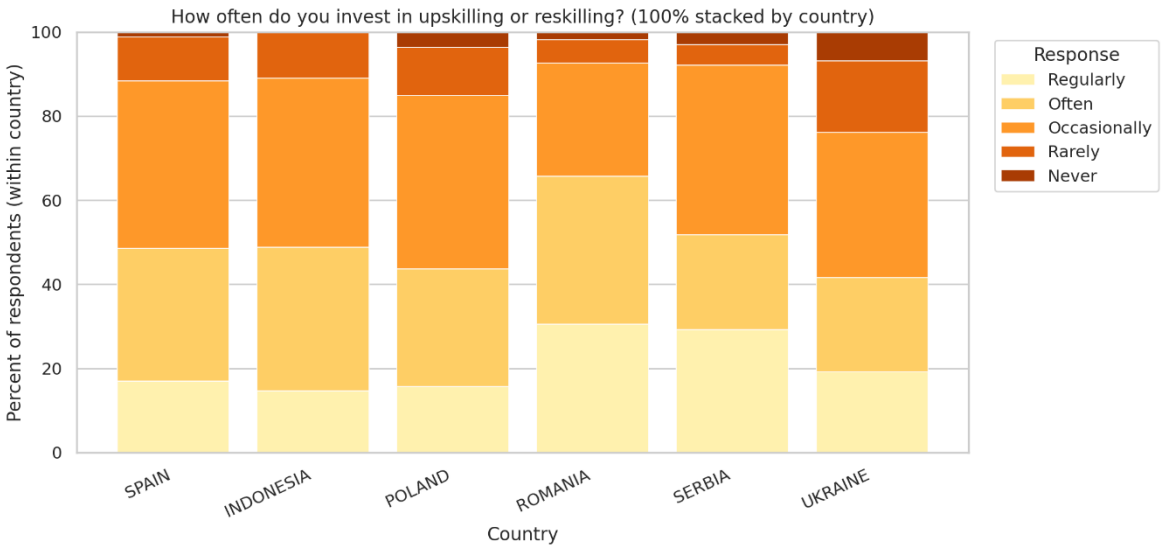


Figure 52. Frequency of upskilling/reskilling, by country.

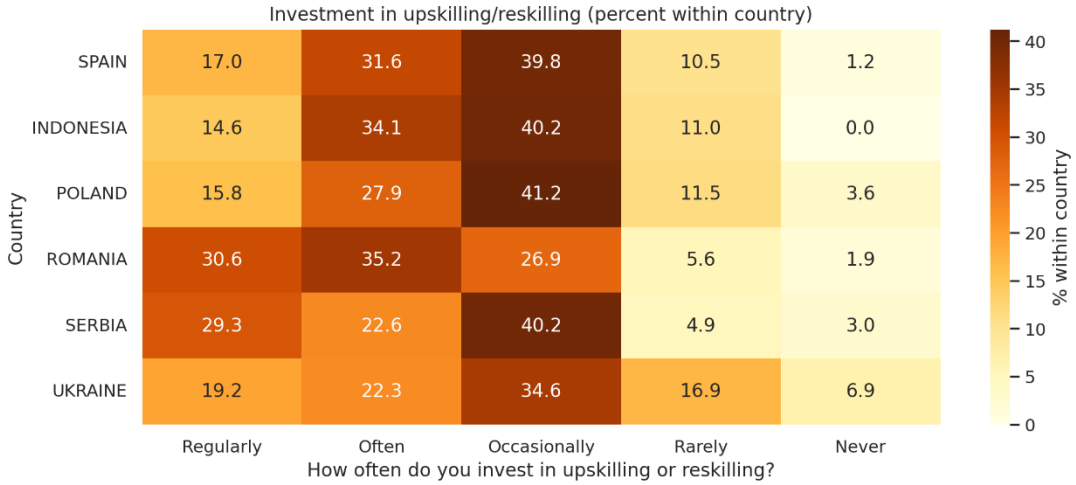


Figure 53. Investment in upskilling/reskilling: A heatmap representation.

Spain, Indonesia, and Poland occupy an intermediate position characterized by steady but less intensive engagement. Regular investment ranges from 14.6% in Indonesia to 17.0% in Spain, while roughly one-third report investing often. Poland

shows a similar structure but slightly higher disengagement, with 3.6% reporting no investment, the highest "never" share among European countries in the sample. Quartile distributions in these countries remain tightly clustered (Q1 = Often, Median = Occasionally, Q3 = Occasionally; IQR = 1), indicating a stable pattern centred on moderate but consistent learning.

Ukraine records the lowest overall investment intensity. While 19.2% report regular investment, the country shows the largest share of infrequent engagement, with 16.9% investing rarely and 6.9% never, producing a combined 23.8% low-investment group. Despite this heavier upper tail, quartiles remain aligned with the middle-group countries, suggesting that differences arise mainly from increased disengagement among a minority rather than a shift in typical behaviour.

Overall, the quartile analysis reveals two learning profiles. Most countries exhibit a consistent pattern centred on occasional-to-frequent investment, reflecting a broadly shared norm of ongoing skill development. Romania and Serbia differ by demonstrating a more intensive learning orientation, where frequent upskilling becomes the typical rather than moderate behaviour. Importantly, cross-country variation reflects differences in frequency intensity, not participation itself: freelancers almost everywhere engage in learning, but the regularity of investment varies according to local conditions.

These findings reinforce earlier results linking professional development to adaptation pressures, technological change, and evolving client expectations. Markets with higher optimism and stronger anticipated AI adoption also tend to display more frequent upskilling, suggesting a relationship between perceived opportunity and learning investment. From a policy perspective, supporting freelancers therefore requires more than providing training opportunities alone. Structural enabling conditions — such as income stability, accessible learning pathways, and time flexibility — appear equally important in sustaining continuous professional development.

Across the ENTEEF sample (n = 820), 86.1% of freelancers invest in upskilling at least occasionally, with average behaviour positioned between often and occasionally (mean = 2.45). Romania and Serbia show the highest levels of frequent investment,

while Ukraine records the largest share of rare or non-investment. Continuous learning thus emerges as a widespread norm among freelancers, though the intensity of engagement varies across national contexts, reflecting differences in opportunity structures and professional sustainability.

2.4.10 Pathways to skill acquisition and development in freelancing

This section examines how freelancers acquire and develop professional skills. The analysis is based on four binary multiple-response items — online sources (SK_Online), offline courses (SK_Offline), formal education (SK_FormalEdu), and work experience (SK_WorkExp) — coded as 1 = Yes and 2 = No. All variables contain 820 valid responses, ensuring full comparability across countries.

Across the ENTEEF sample, freelancers rely primarily on flexible and practice-oriented learning pathways. Online sources represent the dominant channel, used by 77.3% of respondents (n = 634), as shown in Figure 54. Work experience follows as the second most common pathway (53.5%, n = 439), highlighting the importance of learning-by-doing within freelance careers. More structured learning routes are less prevalent. Offline courses are used by 37.1% (n = 304), while universities or formal education are reported by only 26.7% (n = 219), making formal education the least common pathway for ongoing skill development.

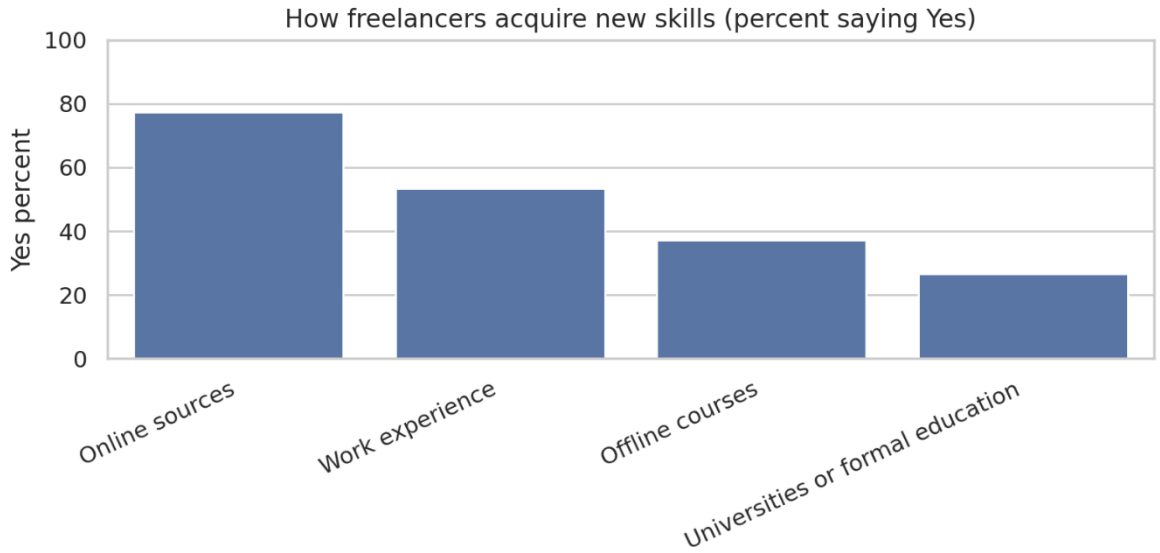


Figure 54. Pathways to skill acquisition.

Overall, the pattern indicates that freelancers favour just-in-time, flexible learning mechanisms, complemented by experiential learning, rather than traditional institutional training formats. Although online learning dominates in all countries, meaningful variation appears in how freelancers combine pathways (Figure 55).

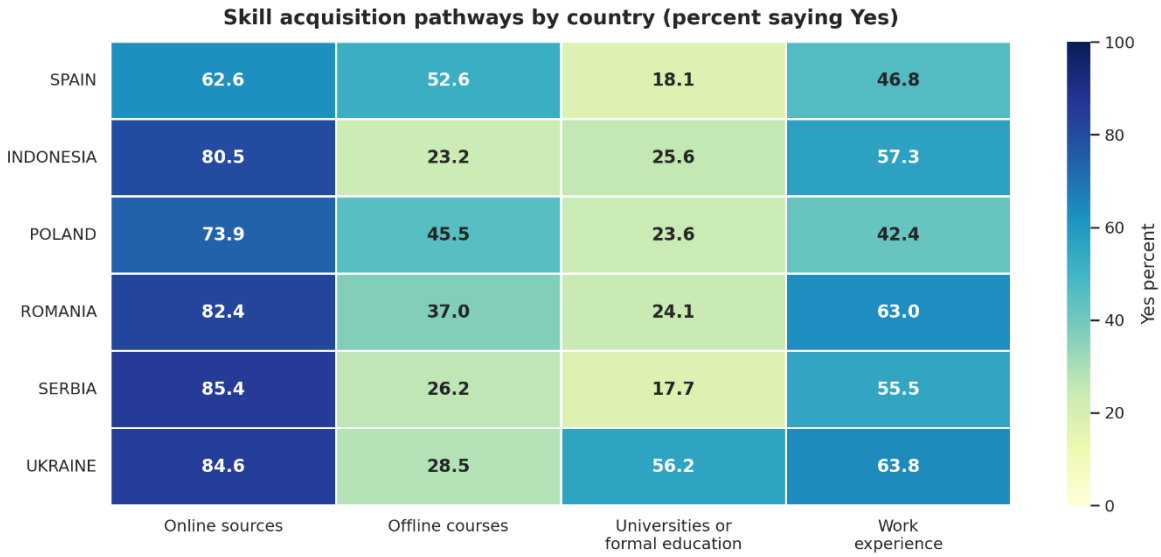


Figure 55. Pathways to skill acquisition by country: A heatmap representation.

Online sources are most widely used in Serbia (85.4%), Ukraine (84.6%), and Romania (82.4%), while Spain records the lowest usage (62.6%), suggesting relatively greater reliance on alternative learning formats. Spain also stands out for its

comparatively high use of offline courses (52.6%), indicating stronger engagement with in-person training environments.

Ukraine differs most strongly in its reliance on formal education, with 56.2% reporting universities as a skills pathway — more than double the share observed in other countries. Work experience is consistently important across contexts but reaches its highest levels in Romania (63.0%) and Ukraine (63.8%), reinforcing the role of practical learning in these markets.

To understand learning strategies more fully, a pathway-count indicator was created by summing the number of pathways used by each respondent. Most freelancers rely on multiple learning routes rather than a single source. The largest group uses two pathways (38.0%), followed by one pathway (36.3%) and three pathways (20.2%). Only 5.4% report using all four pathways simultaneously (Figure 56).

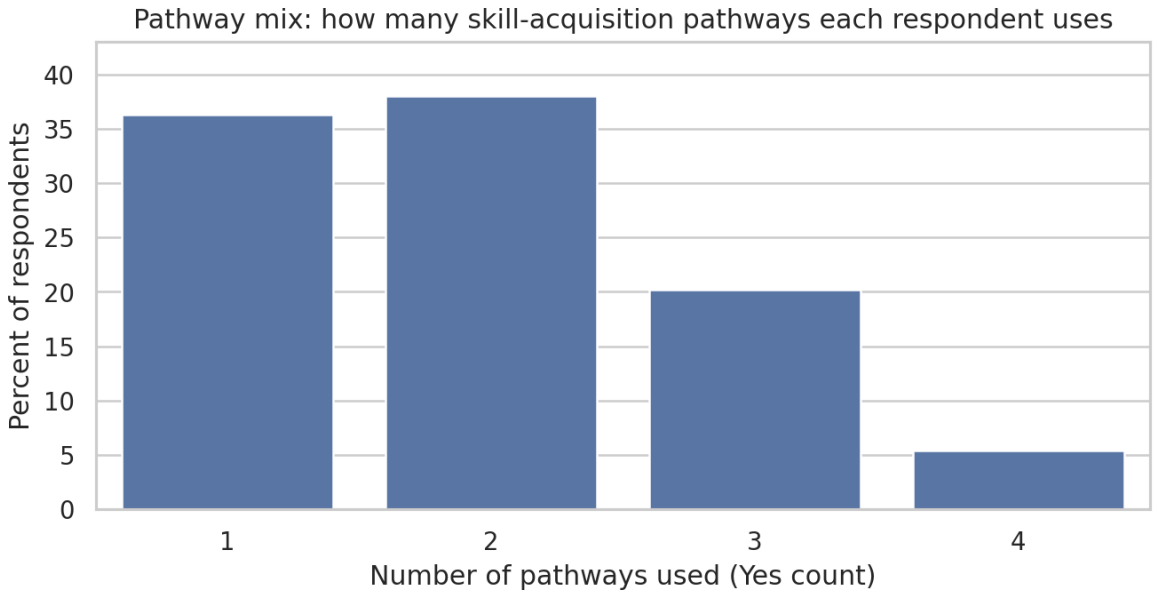


Figure 56. Number of pathways for skill acquisition.

This distribution indicates that freelance skill development is typically hybrid, combining complementary learning channels rather than depending on a single approach. Examining exact pathway combinations further illustrates how freelancers structure learning behaviour. The two most common patterns are (Figure 57):

- Online sources only (20.0%)
- Online sources combined with work experience (19.8%)

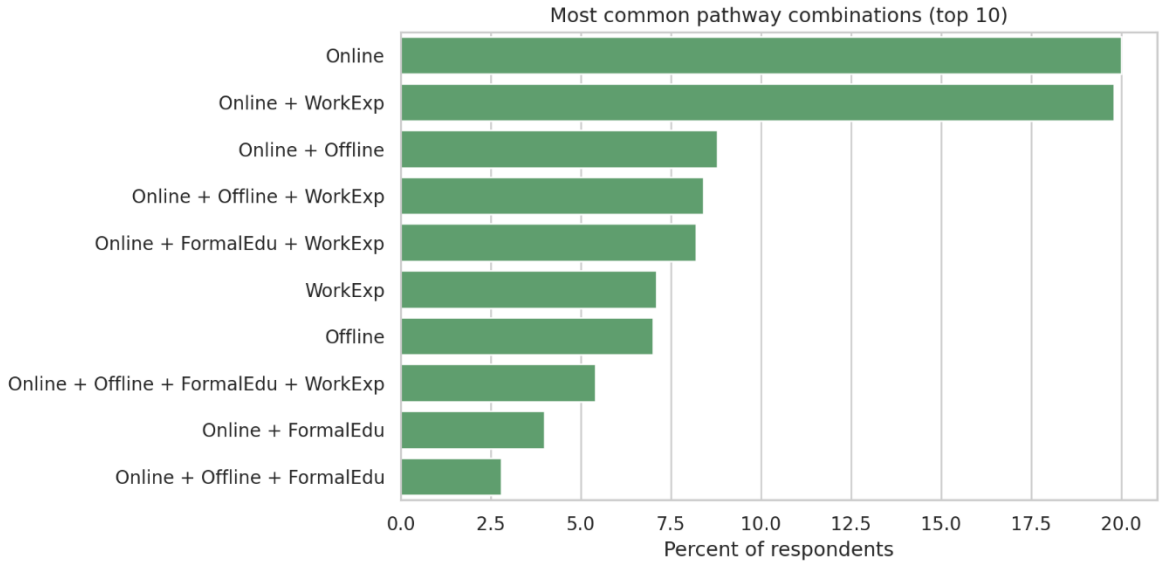


Figure 57. Most common pathways combinations.

Beyond these dominant patterns, combinations diversify but generally remain anchored in online learning. Even when offline courses or formal education are included, they typically complement rather than replace digital learning pathways.

Country comparisons show variation in how broadly freelancers mix learning channels (Figure 58).

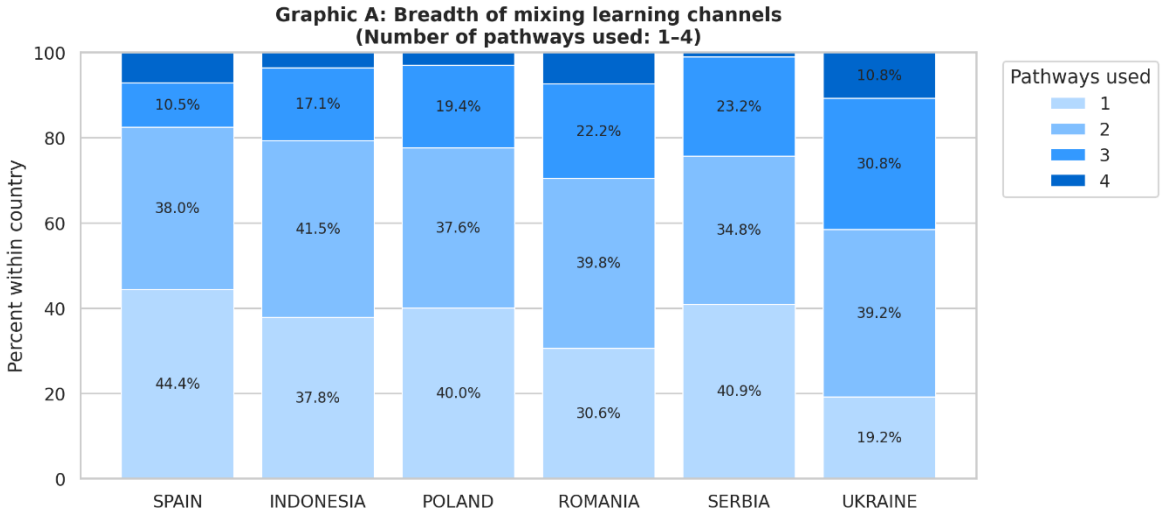


Figure 58. Pathway of professional development combinations: A heatmap representation.

Ukraine displays the highest diversification, with 10.8% using all four pathways and 30.8% using three, suggesting a more integrated learning ecosystem. Other countries cluster more strongly around one or two pathways, indicating narrower but still multi-channel strategies.

The most common learning pattern (modal combination) differs across national contexts (Figure 59):

- Spain is unique in that the most common pathway is offline courses only (18.1%), followed closely by online sources plus work experience (16.4%).
- Indonesia and Romania most frequently combine online learning with work experience (26.8% and 26.9%, respectively).
- Poland and Serbia show a simpler structure, where online learning alone is the most common pathway (20.0% and 31.1%).
- Ukraine stands out again, with the modal combination being online learning + formal education + work experience (23.8%), reflecting the unusually strong role of formal education within its skills ecosystem.

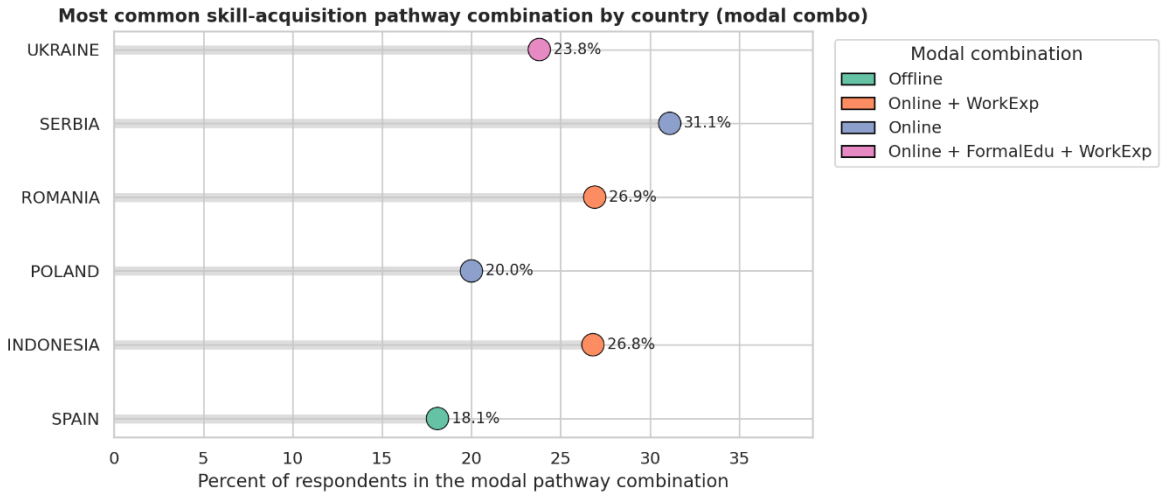


Figure 59. Modal combinations of skill acquisition pathways by country.

Across countries, freelancers rarely rely on a single pathway for skill acquisition. Instead, learning strategies combine digital resources and experiential development, with institutional education playing a supplementary role. Differences between countries reflect variations in pathway mix and intensity, not fundamental differences in engagement with learning itself.

Spain demonstrates stronger reliance on structured offline training, while Ukraine exhibits the most diversified and education-integrated model. Romania and Indonesia emphasize experiential learning alongside online sources, whereas Poland and Serbia rely more heavily on digital self-directed learning.

The findings suggest that freelance skill development operates primarily through flexible, self-directed systems aligned with project-based work. Online learning functions as the backbone of skill acquisition, while work experience reinforces applied competence. Formal education remains relevant but is rarely the primary mechanism for ongoing development.

From a policy and program perspective, effective support for freelancers should therefore prioritize modular, accessible, and practice-oriented learning opportunities. Strengthening connections between experiential learning, digital training resources, and formal education pathways may help expand skill development capacity without disrupting freelancers' flexible work structures.

Across the ENTEEF sample (n = 820), freelancers most commonly acquire skills through online sources (77.3%) and work experience (53.5%), while offline courses (37.1%) and formal education (26.7%) play smaller roles. Most freelancers combine multiple pathways, with two pathways representing the typical learning strategy. Ukraine shows the most diversified pathway mix and the strongest integration of formal education, whereas Spain relies comparatively more on offline training. Overall, freelance skill development is characterized by hybrid, flexible learning models centred on digital and experiential pathways.

2.5 Freelancer competency analysis: Importance and proficiency

2.5.1 Overview

This subsection compares countries across the set of personal-profile skills, examining three complementary dimensions: perceived importance, self-assessed proficiency, and the resulting competence gap. All variables were available for the full analytical sample with no missing data. Skills were measured using parallel five-point scales. Importance was rated from 1 (not important) to 5 (extremely important), while proficiency ranged from 1 (beginner) to 5 (master). To capture priority areas more accurately, skill gaps were calculated using a weighted formulation:

$$\text{Gap} = \max(0, (\text{Importance} - \text{Proficiency}) \times \text{Importance})$$

This approach increases the gap magnitude when a skill is both highly important and insufficiently mastered, thereby emphasizing strategically critical deficits rather than minor discrepancies. Across all countries, a consistent structural pattern emerges: importance ratings are uniformly high, whereas proficiency levels vary more substantially, generating meaningful cross-country differences in weighted skill gaps.

2.5.2 Country comparison of personal-profile skills

This section presents a comparative analysis of Personal-Profile (PP) competencies across six participating countries — Spain, Indonesia, Poland, Romania, Serbia, and Ukraine — with the objective of identifying priority areas for personal and professional

capability development among freelancers. Personal-profile competencies represent transversal capacities that support autonomous work organisation, resilience, decision-making, and sustainable participation in flexible labour markets.

The analytical framework applies the same needs-assessment logic used in previous skill domains, evaluating not only competency levels but also the alignment between perceived proficiency and perceived importance for professional success.

Measurement model

Each competency is measured using two self-reported indicators:

- Proficiency (P): perceived current capability level;
- Importance (I): perceived relevance of the competency for effective work performance.

The Personal-Profile module includes eight competencies: self-organization and work discipline, managing uncertainty and stress, engaging and relating with others, learning and expanding skills, domain expertise, identifying and solving problems, formal regulation and compliance, and personal finance management.

Two derived indicators are calculated:

- $G = I - P$, representing the skill gap, and
- $WG = (I-P) \times I$, representing the Weighted Skill Gap (WG), which functions as the primary prioritisation indicator. The weighting procedure increases the analytical relevance of discrepancies occurring in competencies perceived as highly important, thereby linking empirical findings directly to training prioritisation.

Country-level indicators represent averages across skills and respondents following the aggregation procedures. The overall comparison reveals substantial cross-country variation in perceived personal-profile development needs.

Indonesia exhibits the highest overall weighted skill gap (WG ≈ 2.17), followed closely by Serbia (≈ 2.01). Ukraine (≈ 1.56) and Romania (≈ 1.30) display moderate gaps, while Poland (≈ 0.48) and Spain (≈ 0.33) show comparatively small discrepancies between importance and proficiency (Figure 60).

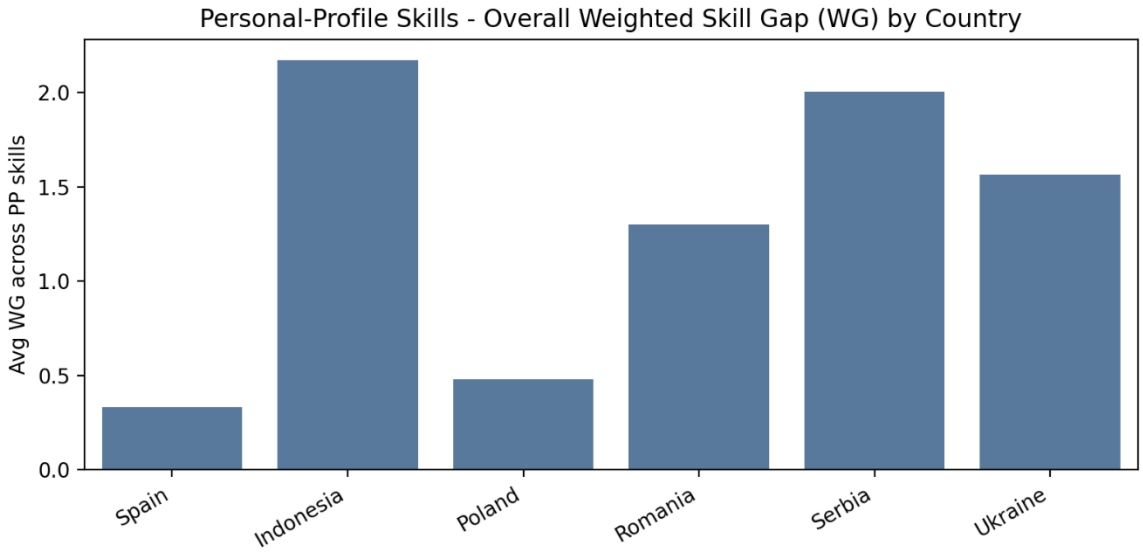


Figure 60. Personal-Profile skills (overall Weighted Skill Gap).

The interpretation is developmental rather than evaluative:

- Higher weighted gaps indicate stronger perceived need for competency development.
- Lower values indicate closer alignment between existing skills and perceived professional requirements. The pattern suggests that freelancers in Indonesia and Serbia perceive substantial pressure to strengthen personal and self-management capabilities, whereas Spain and Poland appear relatively balanced in this domain.

The relationship between proficiency and importance is illustrated in Figure 61. Across all countries, importance scores systematically exceed proficiency scores, confirming that personal-profile competencies are broadly recognised as critical for freelance success. However, the magnitude of this difference varies considerably.

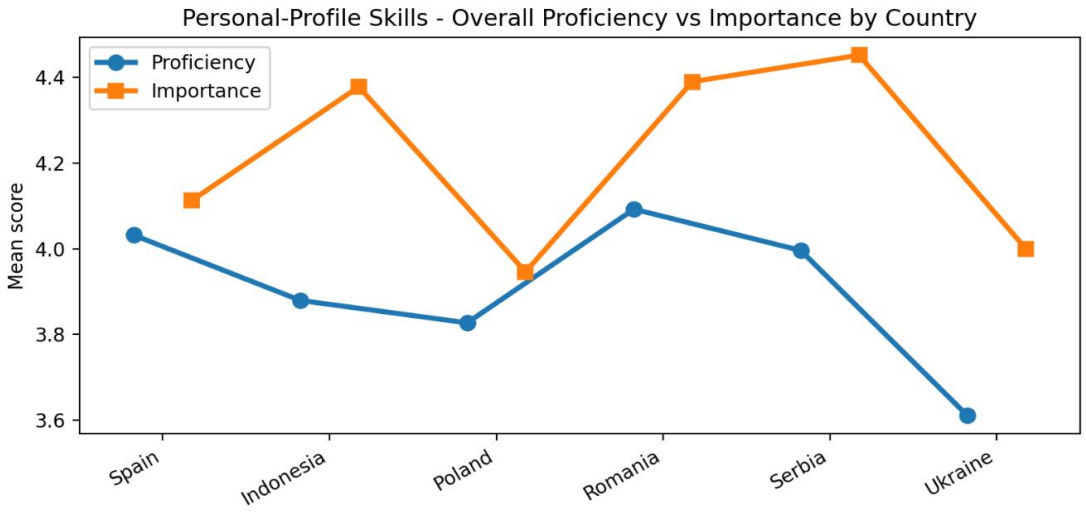


Figure 61. Personal-Profile skills - Overall proficiency vs importance by country.

Indonesia and Serbia demonstrate the largest separations between importance and proficiency, explaining their elevated weighted gaps. Ukraine and Romania show moderate discrepancies, indicating emerging development needs. Spain and Poland present comparatively small differences, suggesting that existing capabilities largely correspond to perceived expectations. Notably, cross-country differences are driven primarily by higher importance ratings, rather than large variations in proficiency levels. This indicates that perceived labour-market complexity and uncertainty strongly influence development priorities.

The weighted gap heatmap provides detailed insight into which competencies drive national differences (Figure 62).

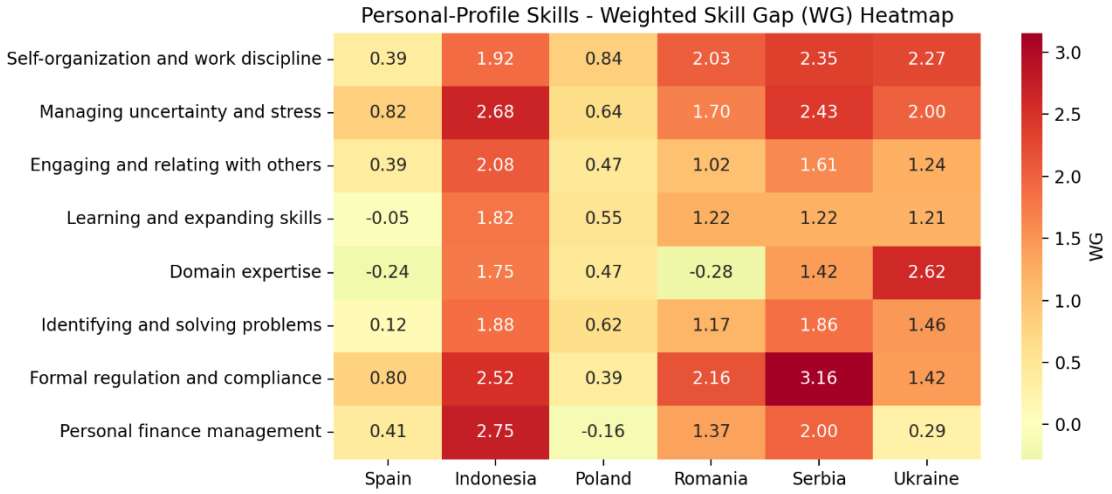


Figure 62. Personal-Profile Skills-Weighted Skill Gap: A heatmap representation.

Several structural trends emerge:

- Self-management and resilience as dominant needs. Competencies related to self-organization and work discipline and managing uncertainty and stress display consistently high weighted gaps across multiple countries. Serbia, Indonesia, and Ukraine show particularly strong values, indicating that freelancers perceive increasing demands for autonomous work regulation and psychological resilience.
- Regulatory and compliance competencies. Formal regulation and compliance produce the largest weighted gap overall, reaching its maximum value in Serbia (WG ≈ 3.16). Romania and Indonesia also display substantial gaps in this competency, suggesting difficulties navigating administrative, contractual, or regulatory requirements associated with freelance work.
- Financial self-management. Personal finance management emerges as a major priority in Indonesia and Serbia, reflecting challenges linked to income volatility, taxation, and financial planning in freelance careers.
- Expertise and problem-solving differentiation. Country-specific patterns are visible for technical and cognitive competencies. Ukraine shows the highest weighted gap in domain expertise, while Indonesia records strong gaps in

engaging with others, learning expansion, and problem solving, indicating broader capability development needs.

Conversely, several competencies in Spain and Poland display relatively small, weighted gaps, suggesting maturity or adequate alignment between skills and expectations.

Synthesising quantitative indicators and visual diagnostics reveals distinct national competency profiles:

- Indonesia demonstrates the strongest and most comprehensive development need, particularly in personal finance management, stress management, and regulatory understanding. The profile reflects freelancers operating in rapidly evolving and uncertain labour conditions.
- Serbia shows highly concentrated gaps in formal regulation and compliance, resilience, and work discipline. The magnitude of these gaps suggests structural challenges related to administrative complexity and self-management demands.
- Ukraine displays priority needs in domain expertise and self-organisation, indicating a strong perceived requirement to strengthen professional positioning alongside personal resilience.
- Romania presents moderate but coherent gaps centred on compliance, discipline, and stress management, consistent with transitional professional environments.
- Poland shows relatively limited urgency, with development priorities focused mainly on organisational discipline and problem-solving competencies.
- Spain records the smallest weighted gaps overall, indicating that personal-profile competencies largely meet perceived professional requirements, although stress management and regulatory awareness remain relevant development areas.

Priority competencies by country

While the relative ranking varies, these competencies appear consistently among national top priorities, highlighting their cross-country relevance for freelance sustainability (Figure 63).

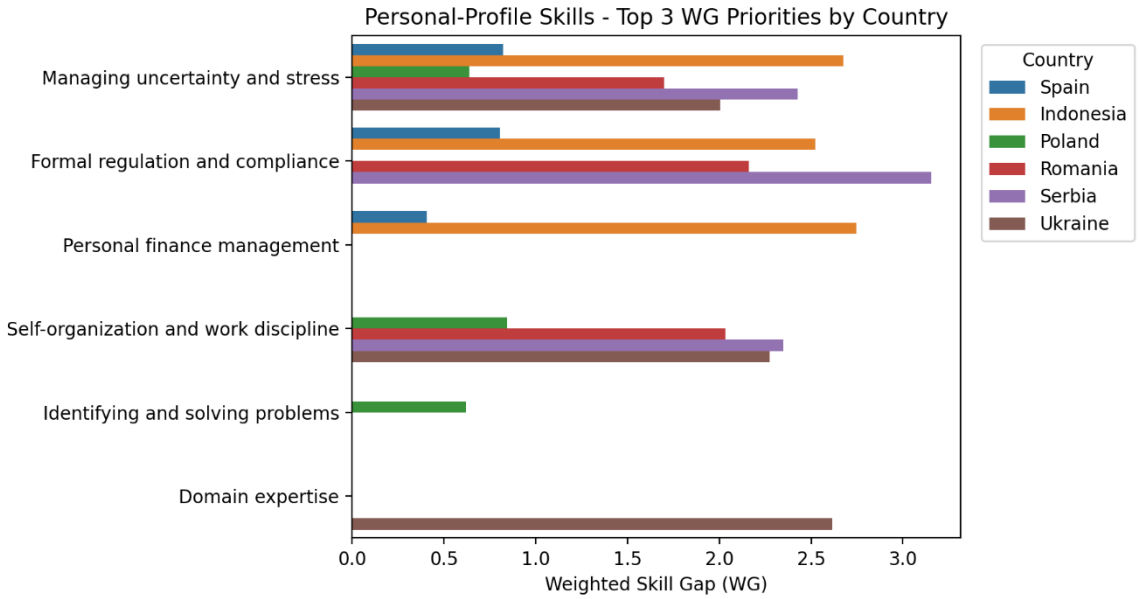


Figure 63. Personal-Profile Skills - Top 3 by country.

The ranking of top development priorities confirms that training needs are structured around a limited set of recurring competencies:

- managing uncertainty and stress,
- formal regulation and compliance,
- self-organization and work discipline,
- personal finance management.

Three key conclusions emerge from the Personal-Profile analysis.

First, development needs are concentrated in self-regulatory and resilience-related competencies, rather than interpersonal or learning-orientation skills alone. This reflects the increasing individual responsibility associated with freelance and platform-based work.

Second, regulatory navigation and financial self-management represent critical capability gaps, suggesting that freelancers require not only professional skills but also institutional literacy to operate effectively within complex economic environments.

Third, the convergence between weighted gap metrics and graphical diagnostics demonstrates the robustness of the analytical framework. Countries identified as high priority in aggregated indicators consistently display strong skill-level gaps across multiple competencies.

Overall, the findings indicate that strengthening personal-profile competencies is essential for enhancing freelancers' adaptability, sustainability, and long-term employability within evolving digital labour markets (Wang et al., 2025).

2.5.3 Country comparison of communication and work-in-a-team transversal skills

This section presents a comparative analysis of Communication and Work-in-a-Team (CWT) transversal skills across six countries participating in the project: Spain, Indonesia, Poland, Romania, Serbia, and Ukraine. The purpose of the analysis is to identify priority areas for skills development among freelancers by examining the alignment between perceived skill proficiency and perceived importance for professional performance. Rather than assessing competence levels in isolation, the analytical approach focuses on skill mismatches, understood as situations in which respondents consider a skill important but perceive their own proficiency as insufficient. This perspective allows the analysis to support evidence-based programme design and targeted upskilling strategies.

Measurement model and operational definitions

Each skill is measured through two self-assessment indicators:

- Proficiency (P): perceived current capability,
- Importance (I): perceived relevance of the skill for successful work outcomes.

Seven skills form the Communication and Work-in-a-Team (CWT) bundle: clarity of expression, assertiveness, self-promotion and branding, working in multicultural

environments, business relationships, prioritisation and task management, and teamwork.

Two derived indicators are calculated:

- G = I−P, representing the unweighted skill gap, and
- WG = (I−P)×I, representing the Weighted Skill Gap Index, which constitutes the principal prioritisation metric.

The weighting procedure amplifies gaps associated with highly important skills, ensuring that training priorities reflect strategic relevance rather than magnitude of difference alone. Country-level values are computed as means of respondent ratings, following the aggregation procedure described in the methodological appendix of the analytical report

Overall country comparison: CWT bundle results

The aggregated Weighted Skill Gap Index reveals systematic cross-country differences in the alignment between importance and proficiency (Table 28).

Country	N (skill ratings)	Avg Proficiency	Avg Importance	Avg Gap (I-P)	Avg Weighted Gap
Ukraine	910	3.652	4.010	0.358	2.088
Indonesia	574	4.052	4.455	0.402	2.066
Serbia	1148	4.140	4.471	0.331	1.817
Romania	756	4.019	4.284	0.266	1.520
Poland	1155	3.678	3.731	0.053	0.958
Spain	1197	4.057	4.007	-0.050	0.390

Table 28. Communication and Work-in-a-Team skills - Overall weighted skill gap index by country.

Countries with higher Avg Weighted Gap have a stronger combination of high importance ratings and under-matched proficiency across the CWT skills.

Ukraine and Indonesia display the highest overall weighted gaps, followed by Serbia and Romania, while Poland shows moderate discrepancies and Spain presents

the lowest aggregate mismatch. Importantly, this ordering should not be interpreted as a ranking of competence quality; instead, it reflects variation in perceived development pressure, namely the degree to which labour-market expectations exceed self-reported capabilities (Figure 64).

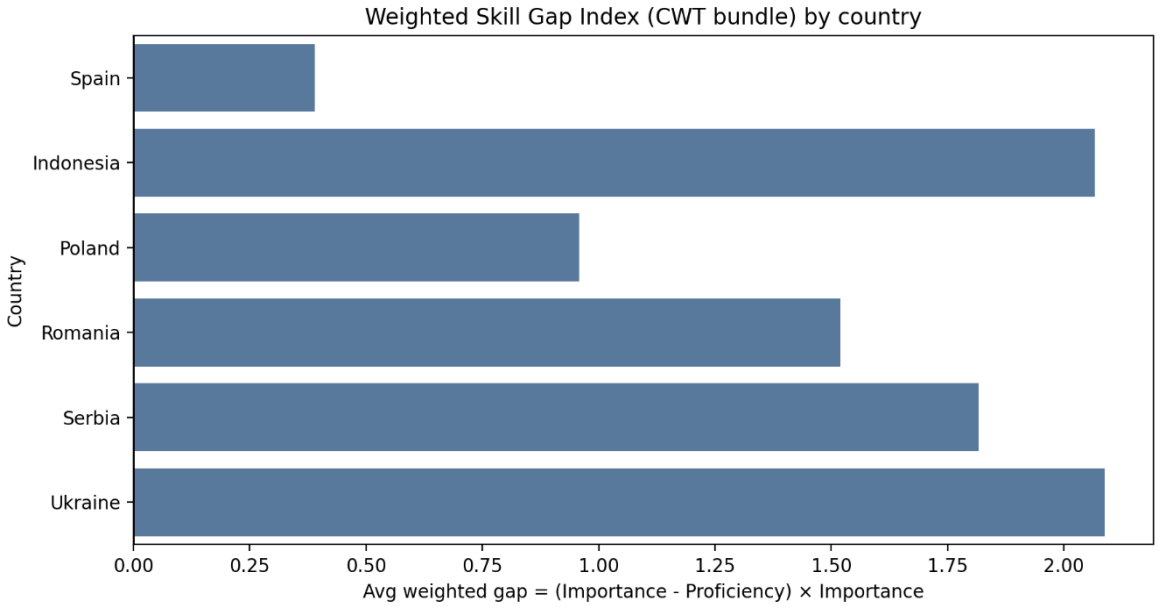


Figure 64. Communication and Work-in-a-Team skills - Weighted skill gap index by country.

Countries with higher weighted gaps combine two characteristics:

1. Communication and teamwork skills are perceived as highly important.
2. Proficiency levels lag behind those expectations.

From a policy perspective, these environments represent contexts where investments in transversal skills training are likely to generate the strongest marginal impact.

The proficiency–importance scatterplots provide a diagnostic complement to weighted gap metrics by revealing why gaps emerge (Figure 65). In each plot, the diagonal line represents perfect alignment between proficiency and importance.

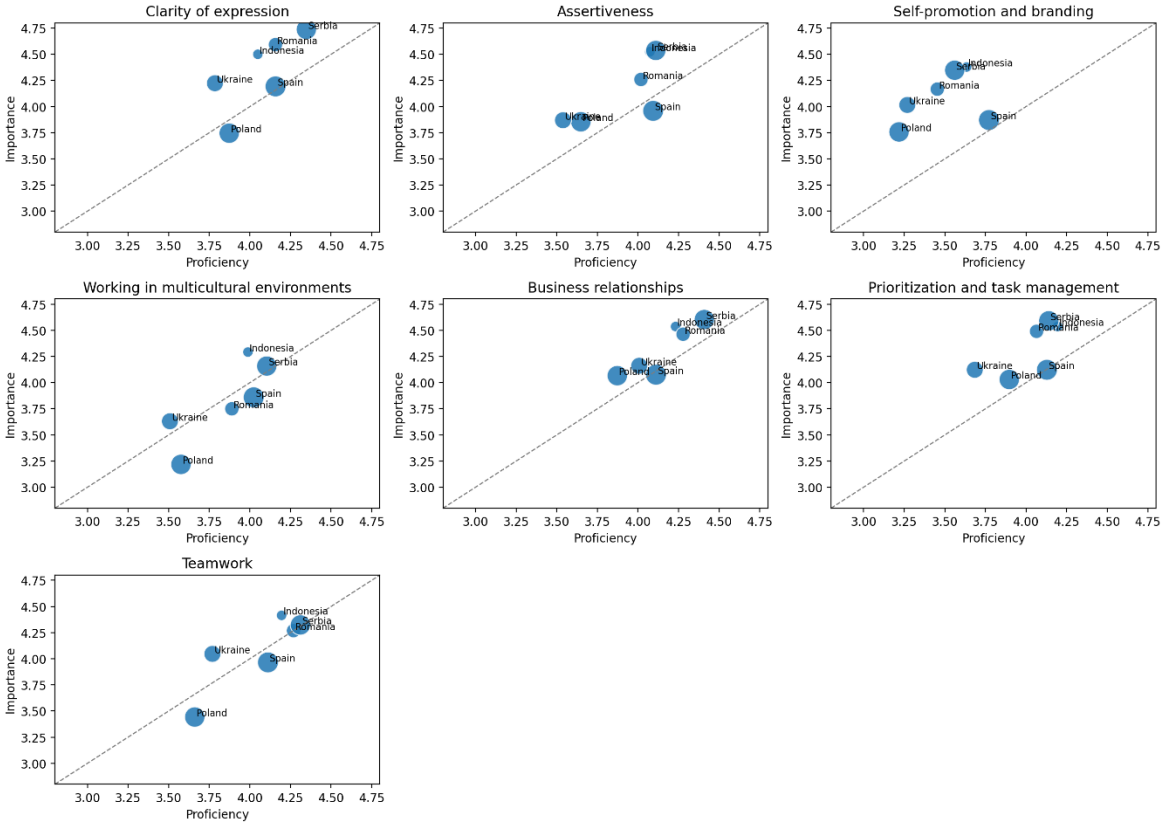


Figure 65. Proficiency – importance: Scatterplots.

Clarity of expression

The visual distribution shows Romania, Serbia, and Indonesia positioned clearly above the equality line, indicating consistently higher importance than proficiency. Ukraine also displays a notable positive discrepancy despite comparatively lower proficiency levels. Poland lies below the main cluster, reflecting lower perceived importance overall rather than a severe capability deficit. These patterns confirm that clarity of expression constitutes a development priority particularly in Eastern and South-Eastern European contexts, where communication demands appear to exceed perceived preparedness.

Assertiveness

Assertiveness exhibits a differentiated structure across countries. Serbia and Indonesia combine very high importance ratings with positive gaps, explaining Serbia's position as the global maximum weighted gap for this skill. Spain, by contrast, lies close to equilibrium, suggesting alignment between expectations and capabilities. Poland

and Ukraine display moderate gaps driven primarily by lower perceived importance rather than weak proficiency. The visual evidence therefore supports the interpretation that assertiveness is a market-interaction skill, becoming critical in environments with stronger client-negotiation pressures.

Self-promotion and branding

The scatterplot for self-promotion and branding reveals the most consistent cross-country pattern: all countries appear above the equality line. This universal positioning visually explains why branding emerges as the highest weighted gap in every country. Serbia and Indonesia show the largest vertical distance from the diagonal, indicating strong perceived importance combined with comparatively lower capability levels. Spain shows a smaller but still positive discrepancy, suggesting that even relatively balanced systems experience unmet needs in market positioning skills.

Working in multicultural environments

Results for multicultural work environments are more heterogeneous. Indonesia exhibits the strongest importance signal, while Poland and Ukraine lie close to or slightly below equilibrium, indicating either sufficient proficiency or lower perceived relevance. The dispersion suggests that multicultural competence is context-dependent and influenced by exposure to international markets.

Business relationships

Across countries, importance ratings for business relationships are uniformly high. Serbia and Indonesia again appear above the equality line, indicating persistent development needs, whereas Spain and Poland show near alignment between proficiency and importance. This indicates that relational competencies are widely recognised but unevenly internalised.

Prioritisation and task management

Romania, Serbia, and Indonesia display the highest importance levels combined with positive gaps, explaining their elevated weighted gap scores. Ukraine shows lower proficiency but similarly strong importance, confirming prioritisation as a key execution-related competence in higher-gap countries.

Teamwork

Teamwork presents the most varied configuration. Ukraine shows a clear positive gap, indicating unmet collaborative skill demands, while Spain lies slightly below the equality line, suggesting proficiency exceeding perceived necessity. Poland exhibits the lowest importance ratings overall, explaining its minimal weighted gap. The spider charts provide a holistic comparison across skills and countries.

The importance spider chart demonstrates consistently high ratings across most skills in Serbia and Indonesia, indicating strong perceived market expectations (Figure 66). Poland shows systematically lower importance scores, suggesting a comparatively different perception of freelance skill requirements.

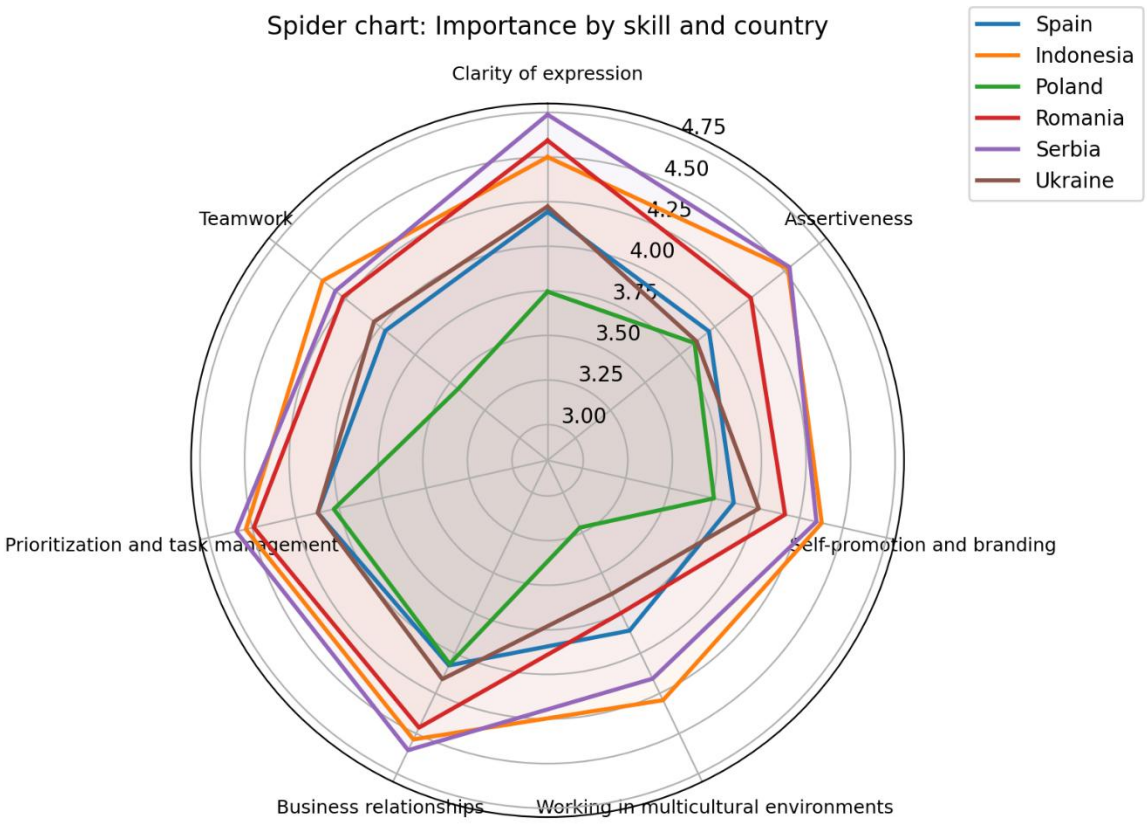


Figure 66. Importance by skill and by country: Spider chart.

The proficiency chart reveals less variation across countries than importance ratings, implying that cross-country differences in weighted gaps are driven primarily

by differences in perceived importance, not dramatic disparities in capability (Figure 66).

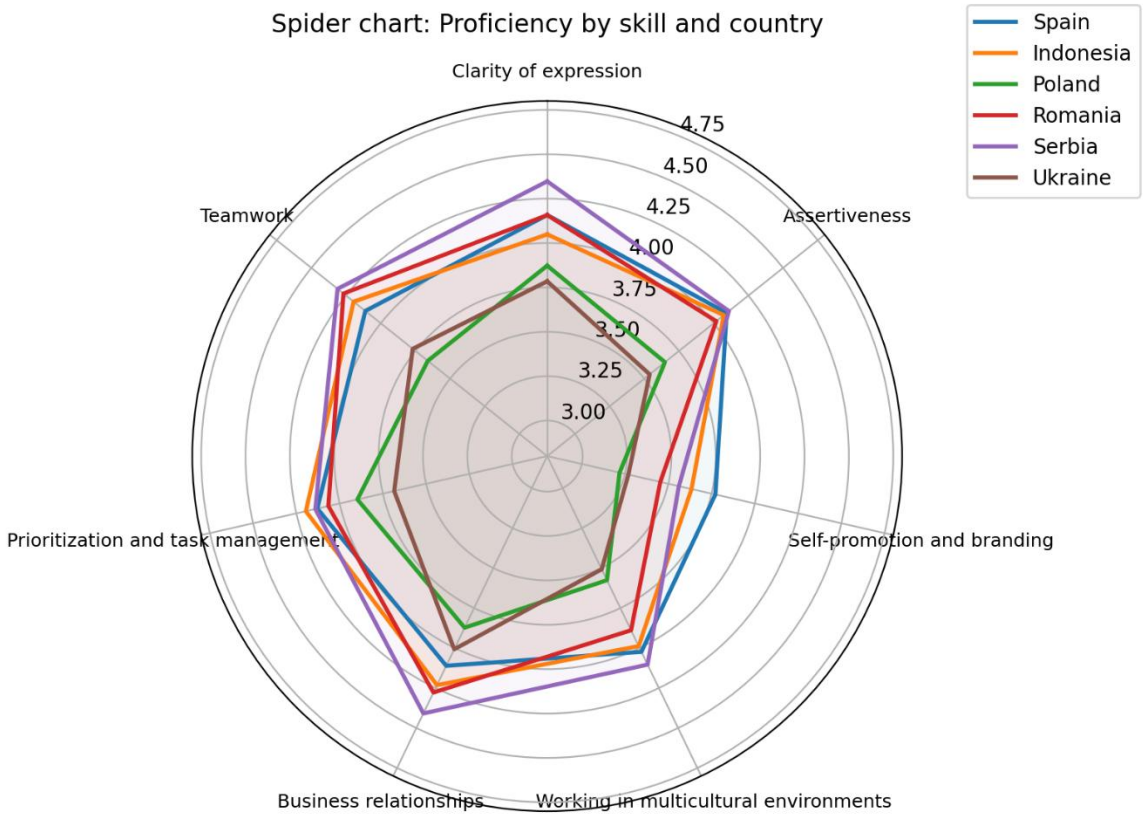


Figure 67. Proficiency by skill and country.

Weighted gap profiles

The weighted-gap spider chart highlights a striking convergence: self-promotion and branding forms the dominant peak across nearly all countries, while clarity of expression and prioritisation create secondary peaks in higher-gap contexts (Figure 68). This confirms that the main driver of training priorities is not a single national deficiency but a shared structural challenge within freelance ecosystems.

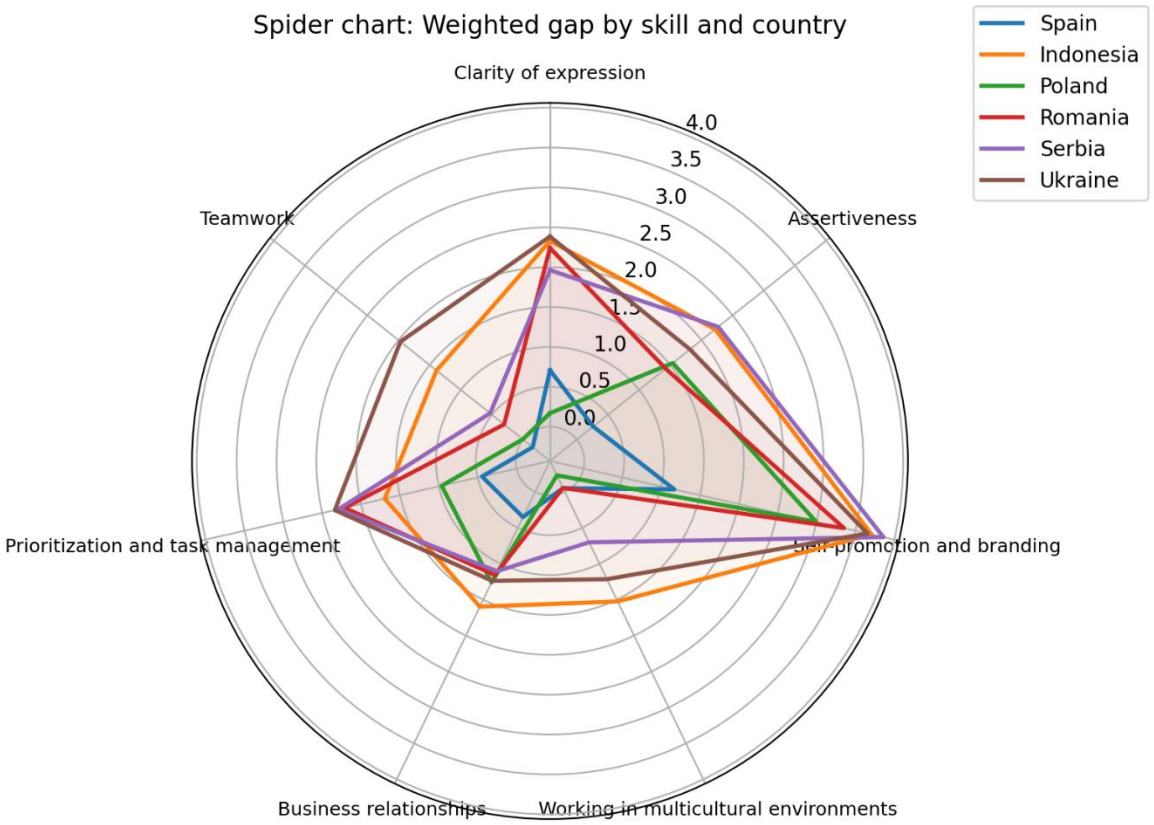


Figure 68. Weighted gap by skill and country: Spider chart.

Country development profiles

Synthesising numerical and visual evidence produces distinct country patterns (Table 29):

- Spain demonstrates overall alignment between proficiency and importance, indicating targeted rather than systemic training needs.
- Indonesia shows broad communication-related mismatches, suggesting integrated client-facing communication programmes.
- Poland presents moderate gaps concentrated in branding and interpersonal influence skills.
- Romania combines communication clarity needs with execution-oriented competencies.
- Serbia displays the strongest branding and assertiveness gaps, reflecting challenges in market positioning.

- Ukraine shows the most comprehensive mismatch pattern, particularly in clarity, prioritisation, and teamwork.

Country	Rank	Skill	WG	Importance (I)	Proficiency (P)	Gap (I-P)
Indonesia	1	Self-promotion and branding	3.707	4.378	3.634	0.744
Indonesia	2	Clarity of expression	2.329	4.500	4.049	0.451
Indonesia	3	Assertiveness	2.220	4.524	4.073	0.451
Poland	1	Self-promotion and branding	2.994	3.758	3.218	0.539
Poland	2	Assertiveness	1.539	3.855	3.648	0.206
Poland	3	Business relationships	1.261	4.067	3.873	0.194
Romania	1	Self-promotion and branding	3.352	4.167	3.454	0.713
Romania	2	Clarity of expression	2.241	4.593	4.157	0.435
Romania	3	Prioritization and task management	2.213	4.491	4.065	0.426
Serbia	1	Self-promotion and branding	3.86	4.348	3.561	0.787
Serbia	2	Prioritization and task management	2.293	4.591	4.14	0.451
Serbia	3	Assertiveness	2.268	4.537	4.11	0.427
Spain	1	Self-promotion and branding	1.17	3.871	3.772	0.099
Spain	2	Clarity of expression	0.708	4.193	4.158	0.035
Spain	3	Prioritization and task management	0.444	4.123	4.129	-0.006
Ukraine	1	Self-promotion and branding	3.654	4.015	3.269	0.746

Country	Rank	Skill	WG	Importance (I)	Proficiency (P)	Gap (I-P)
Ukraine	2	Clarity of expression	2.385	4.223	3.785	0.438
Ukraine	3	Prioritization and task management	2.338	4.123	3.685	0.438

Table 29. Country development profile.

Implications for programme design

Taken together, the analytical framework and visual diagnostics support three overarching conclusions.

First, self-promotion and personal branding constitute a cross-country bottleneck, emerging as the dominant development priority in all analysed contexts.

Second, execution-related communication skills — particularly clarity of expression and prioritisation — represent secondary but structurally important needs in higher-gap countries.

Third, teamwork requirements vary substantially across national freelance environments, highlighting the necessity of context-sensitive training strategies.

The combined use of weighted gap indices and visual diagnostics provides a transparent and reproducible methodology linking empirical survey data to actionable training recommendations, thereby supporting evidence-based decision-making within the project framework.

2.5.4 Country comparison of digital literacy skills

This section presents a comparative analysis of Digital Literacy (DL) skills across six participating countries — Spain, Indonesia, Poland, Romania, Serbia, and Ukraine — with the aim of identifying priority areas for digital upskilling among freelancers. The analysis follows the same needs-based methodological logic applied to communication and teamwork skills, focusing on the relationship between perceived skill proficiency and perceived importance for professional activities.

Digital literacy is examined not merely as a measure of technological capability but as a functional component of participation in digital labour markets, including platform work, collaborative environments, and emerging AI-supported workflows. The analytical objective is therefore to determine where perceived digital skill requirements exceed existing competence levels and where training interventions are most likely to produce measurable impact.

Measurement model and operational definitions

Each digital literacy skill is evaluated using two self-reported indicators:

- Proficiency (P): respondents' perceived current competence level,
- Importance (I): perceived relevance of the skill for successful work performance.

The Digital Literacy module includes six skills: assessing online information, cloud project management, cloud storage and sharing, collaboration tools, digital labour platforms, AI tools.

Two derived indicators are computed at the country–skill level:

- $G = I - P$, representing the skill gap, and
- $WG = (I - P) \times I$, representing the Weighted Skill Gap Index, which serves as the principal prioritisation metric.

The weighting mechanism increases the analytical importance of gaps occurring in highly valued skills, ensuring alignment between empirical results and policy-oriented training prioritisation. Country-level indicators are calculated as arithmetic means across respondents, and overall country scores represent averages across the six digital literacy skills

Overall digital literacy comparison across countries

The aggregated Weighted Skill Gap Index reveals clear cross-country differences in perceived digital skill readiness (Figure 69).

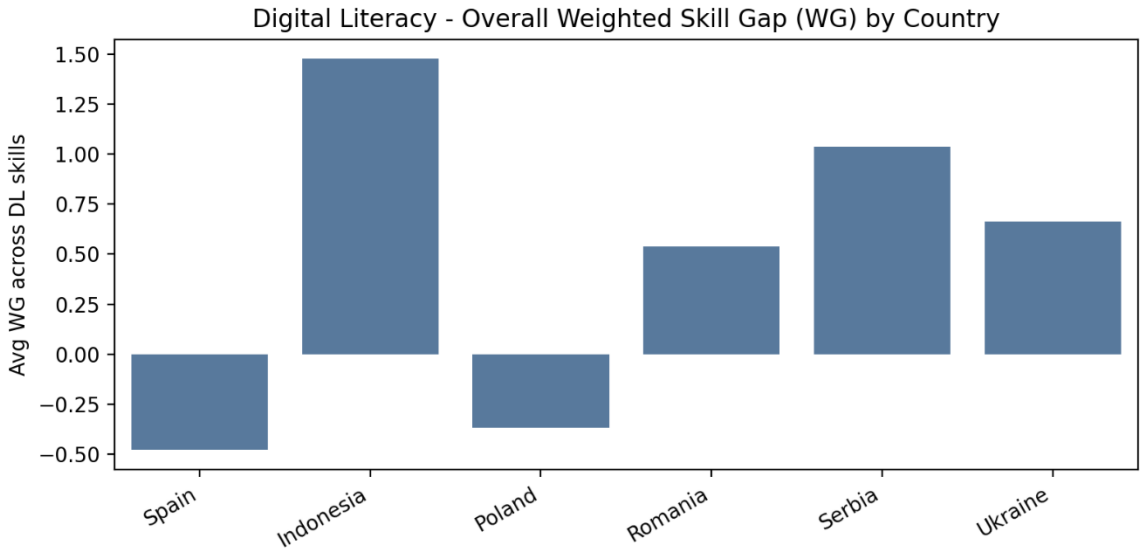


Figure 69. Digital literacy - overall weighted skill gap by country.

Indonesia records the highest overall weighted gap (WG ≈ 1.48), followed by Serbia (≈ 1.04), Ukraine (≈ 0.66), and Romania (≈ 0.54). In contrast, Poland (≈ −0.37) and Spain (≈ −0.48) exhibit negative average weighted gaps.

The interpretation of these results is conceptually important. Positive weighted gaps indicate that digital skills are perceived as important while proficiency remains insufficient. Negative values do not indicate weak skills; rather, they suggest that, on average, proficiency already meets or exceeds perceived importance levels.

Consequently:

- Indonesia and Serbia emerge as the contexts with the strongest digital upskilling urgency.
- Ukraine and Romania show moderate but consistent development needs.
- Poland and Spain demonstrate relative equilibrium between capability and perceived necessity.

This overall pattern is visually summarised in Figure 69 (Overall Weighted Gap by Country), where the height and direction of bars directly represent aggregate training urgency.

The proficiency–importance comparison plot provides insight into the mechanisms underlying country differences (Figure 70).

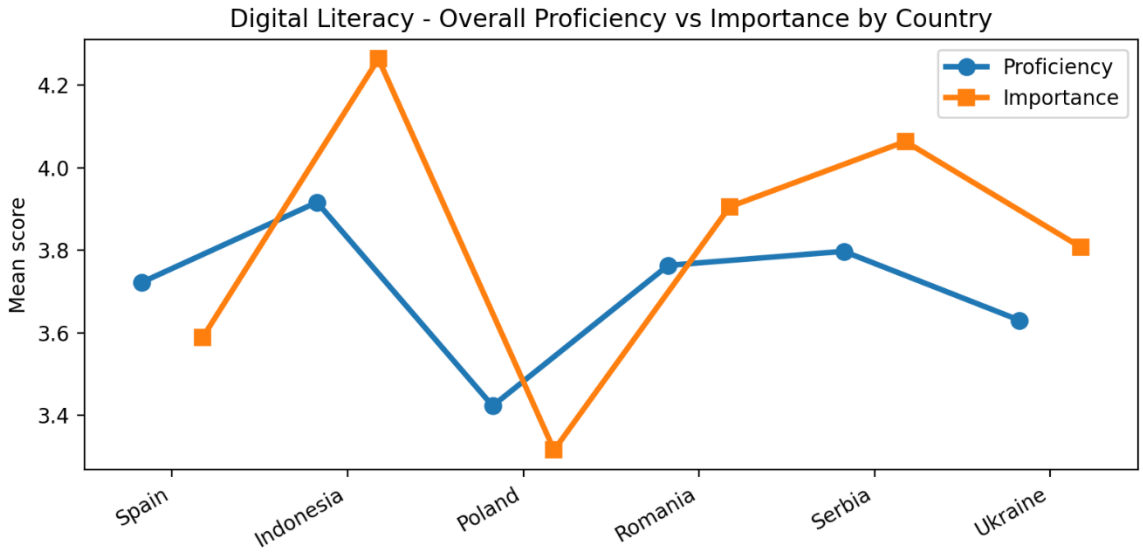


Figure 70. Digital literacy - Overall Proficiency vs Importance by country.

Indonesia and Serbia display consistently higher importance scores relative to proficiency, explaining their elevated weighted gaps. Ukraine and Romania show smaller but still positive separations between the two indicators, suggesting emerging rather than critical skill mismatches.

By contrast, Spain and Poland exhibit slightly higher proficiency than importance across the digital literacy bundle. This configuration indicates that respondents in these countries do not currently perceive digital literacy as a binding constraint for professional performance, even when capability levels are comparable to those observed elsewhere.

Importantly, the visual comparison confirms that cross-country differences are driven primarily by variations in perceived importance, rather than dramatic disparities in proficiency levels.

The weighted gap heatmap enables identification of specific skills driving country-level priorities (Figure 71). Warm colours represent high positive weighted gaps, indicating strong training needs, whereas cooler tones indicate alignment or potential overcapacity.

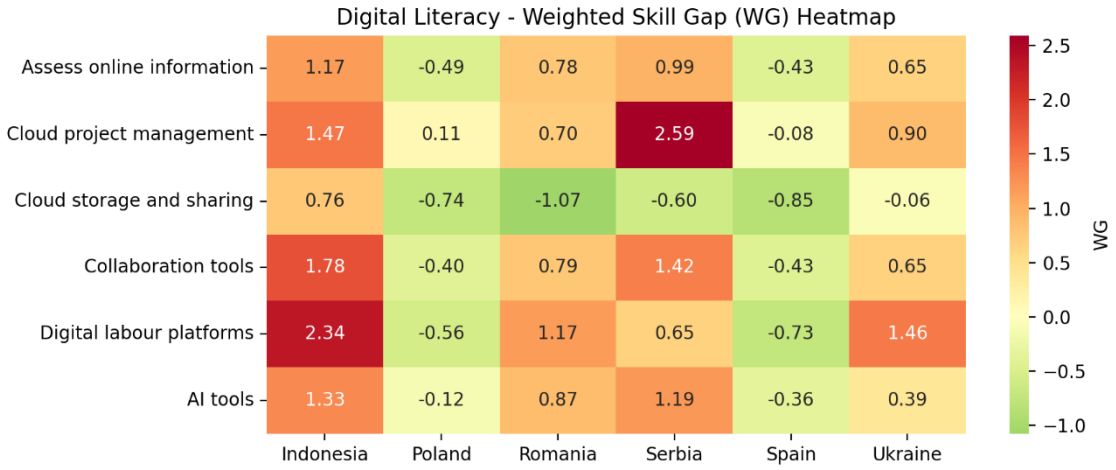


Figure 71. Digital literacy - weighted skill gap: A heatmap representation.

Several structural patterns emerge.

First, digital labour platforms represent a dominant priority in multiple countries. Indonesia and Ukraine display particularly high weighted gaps, reflecting strong perceived importance associated with platform-based work combined with proficiency shortfalls. Romania shows a similar, though less pronounced, pattern.

Second, cloud project management emerges as the single largest skill gap overall, particularly in Serbia, where the weighted gap reaches its maximum value across all digital literacy skills. This indicates substantial unmet demand for structured digital workflow management capabilities.

Third, collaboration tools and AI tools consistently produce positive weighted gaps in higher-priority countries, suggesting growing expectations related to digitally mediated collaboration and automation-supported work practices.

In contrast, cloud storage and sharing frequently produces negative weighted gaps, indicating that this foundational competence is already well internalised and does not currently represent a major training priority.

2.5.5 Harmonized integrated training

The final stage of the analysis integrates findings across the three competence domains examined throughout the ENTEEF research framework:

- Communication and Work in a Team (CWT)
- Digital Literacy Skills (DL)
- Personal Profile Competences (PP)

Rather than interpreting these domains independently, the synthesis adopts a systemic perspective, recognising that freelancer performance depends on the interaction between interpersonal, digital, and self-management capabilities. The integrated narrative therefore translates empirical gap analyses into a unified interpretation of training priorities guiding programme design, curriculum development, and future learning interventions within ENTEEF.

Across countries, competence gaps were measured as discrepancies between perceived importance and proficiency and aggregated using harmonised analytical procedures. The combined evidence demonstrates that freelancer development needs are transversal and interdependent, forming a coherent competence ecosystem rather than isolated skill shortages.

The harmonised analysis reveals a consistent concentration of training needs in three mutually reinforcing domains.

1. Communication and Work in a Team (CWT)

Communication-related competences emerge as foundational enablers of freelance market participation, consistent with International Labour Organizations' recommendations (ILO, 2025). Across countries, several competences repeatedly appear among the highest-priority training needs:

- self-promotion and personal branding,
- clarity of expression,
- negotiation and assertiveness,
- prioritisation and task management,
- teamwork and collaborative interaction.

Self-promotion and branding represent a cross-country bottleneck, appearing as the dominant development priority in multiple national contexts. The findings indicate that freelancers frequently possess technical expertise but face difficulties communicating value, positioning themselves competitively, and managing client

relationships. Execution-oriented communication skills — particularly clarity of expression and prioritisation — further indicate growing expectations for structured collaboration in digitally coordinated work environments.

2. Digital Literacy Skills (DL)

Digital literacy competences generally display moderate aggregated gaps but include several strategically critical areas. The analysis highlights three principal digital development needs:

- Cloud-based workflow management, including project management and collaboration tools.
- Participation in digitally coordinated work environments, particularly digital labour platforms.
- AI-related competences, identified as a critical training priority due to rapidly increasing importance combined with insufficient proficiency.

Digital literacy gaps therefore reflect not basic technological deficiencies but challenges associated with integrating digital tools into professional workflows and productivity systems. Importantly, AI competences emerge as an accelerating capability gap, signalling future-oriented training needs rather than legacy skill deficits.

3. Personal Profile Competences (PP)

Personal-profile competences consistently represent the strongest and most structurally significant training needs across analyses. National reports repeatedly identify high gaps in:

- self-organisation and work discipline,
- managing uncertainty and stress,
- problem identification and solving,
- regulatory and compliance knowledge,
- professional autonomy and responsibility.

Both freelancers and companies recognise these deficiencies, indicating shared awareness of challenges related to independent professional work. These competences underpin freelancers' ability to sustain careers in environments characterised by

income volatility, project discontinuity, and high self-regulation requirements (Wang et al., 2025).

Integrated Interpretation: A Freelancer Competence Ecosystem

The harmonised findings demonstrate that competence gaps are not independent but mutually reinforcing.

Table 30 presents three interconnected capability layers that emerge.

Capability Layer	**Competence Domain**	**Functional Role**
Market Interaction Layer	CWT	Communicating value and collaborating effectively
Digital Execution Layer	DL	Operating within digital work infrastructures
Self-Regulation Layer	PP	Sustaining autonomous professional performance

Table 30. Three interconnected capability layers.

Deficiencies at one layer amplify weaknesses in others. For example:

- Limited self-organisation reduces effective use of digital tools.
- Weak communication skills constrain the commercial value of technical competence.
- Insufficient regulatory knowledge increases professional risk despite strong digital ability.

Consequently, freelancer development must be understood as ecosystem strengthening, not skill correction.

Training Priority Alignment Across Competence Groups

At the aggregated competence-class level, training needs converge toward a shared pattern:

- Personal Profile (PP): highest structural priority
- Communication and Work in a Team (CWT): medium–high priority

- Digital Literacy (DL): medium priority with critical sub-areas

This pattern appears consistently across national analyses, where aggregated gaps for all three competence groups reach at least medium priority levels, even when individual competences vary. The implication is that training strategies should prioritise transversal competences while targeting specific high-gap skills within each domain.

2.6 Implications for WP4 MOOCs Programme Design

The integrated analysis directly informs the pedagogical architecture of ENTEEF training outputs, including the Competence Assessment Tool (CAT) and MOOCs (Work Package 4).

Key design principles emerging from synthesis:

1. **Integrated rather than domain-specific training**. Training modules should combine communication, digital, and personal competences within realistic professional scenarios.
2. **Emphasis on transversal freelancer capabilities**. Priority should be given to competencies enabling autonomy, adaptability, and professional sustainability.
3. **Modular learning pathways**. Different freelancer profiles require differentiated learning trajectories:
    - early-career freelancers: communication and client interaction,
    - mid-career freelancers: productivity and branding,
    - experienced freelancers: digital transformation and AI integration.
4. **Future-oriented digital upskilling**. AI-related competencies should be embedded across modules rather than treated as standalone technical content.

Strategic interpretation for policy and ecosystem development

The synthesis confirms that freelancer skill gaps primarily concern professionalisation, not employability in the traditional sense. **Freelancers must**

simultaneously act as specialists, entrepreneurs, communicators, and self-managers. Therefore, effective interventions extend beyond training delivery and support broader ecosystem development involving higher education curriculum adaptation, labour-market policy support, digital platform capacity building, lifelong learning infrastructures.

The ENTEEF framework demonstrates how harmonised empirical analysis can translate survey evidence into actionable training strategy at European level. Taken together, WP3 findings show that the most significant freelancer development challenges lie at the intersection of communication effectiveness, digital execution, and personal self-management.

The integrated weighted-gap analysis indicates that sustainable freelancer success depends on strengthening a coherent competence ecosystem composed of:

- the ability to communicate and collaborate effectively,
- the capacity to operate within evolving digital environments,
- and the resilience and autonomy required for independent professional careers.

Accordingly, ENTEEF training interventions should prioritise cross-cutting competences that enhance adaptability, professional positioning, and long-term career sustainability across diverse national freelance ecosystems.

Conclusions

Overall, the findings highlight that the freelance ecosystem is highly diverse — both in the services offered and in the skills freelancers rely on — yet it is also shaped by clear regional specializations. Certain countries stand out for strong concentrations in content creation, technology and media production, or business and consulting services, indicating that local market dynamics influence freelance activity.

Companies increasingly view freelancers as valuable contributors, whether for ongoing collaborations or for occasional, highly specialized tasks. The most common areas of freelance hiring — such as web development, audiovisual production, or training — show that organizations largely depend on freelancers for expertise that complements or extends their internal capabilities.

Freelancers' key competencies cluster around four main domains: technical expertise, communication abilities, personal attributes, and relationship-building skills. Technical and communication skills emerge as especially critical, while qualities such as discipline, proactivity, resilience, and time management are essential for operating independently across global and often uncertain environments. Younger freelancers emphasize communication and collaborative abilities, whereas more experienced professionals place greater value on project management and technical depth.

The study also shows that freelancers must continuously adapt and learn to remain competitive. Many recognize the transformative role of AI — perceived mostly as a useful catalyst for productivity and creativity, though not a substitute for human judgment and expertise.

Despite ongoing challenges — including workload management, communication barriers, and the emotional demands of autonomous work — most freelancers report positive motivations for continuing in the field. Freedom, personal growth, financial improvement, and long-term career development consistently drive their commitment

to freelance careers. Their trajectories often reflect increased confidence, strategic orientation, and stronger client relationships.

Finally, working with international clients offers both opportunities and pressures: higher professional standards and better compensation, but also greater complexity and expectations. For those willing to adapt, however, it represents a promising path within a rapidly evolving freelance landscape.

~First chapter, second chapter …

The third chapter of the report provides a comprehensive comparative analysis of freelancer profiles, competencies, and labour market dynamics across six countries (Indonesia, Poland, Romania, Spain, Serbia, Ukraine), offering valuable insights into the evolving nature of freelance work. The findings confirm that freelancing is no longer a marginal or transitional form of employment but a structurally embedded component of modern labour markets, shaped by digital technologies, organizational flexibility, and global connectivity.

Across all countries included in the study, freelancers demonstrate high levels of education and strong engagement in knowledge-intensive and digitally oriented occupations, particularly in information technology and creative industries. At the same time, the analysis reveals substantial heterogeneity in demographic composition, professional experience, and market participation patterns. Distinct national ecosystems emerge, ranging from highly specialized digital markets to more diversified, service-oriented structures, highlighting the importance of contextualizing freelance work within specific economic and institutional environments.

A central finding of the study is that freelancers operate under significant structural pressures. Income instability, market uncertainty, and the continuous need for upskilling are consistently identified as the most pressing challenges. These concerns reflect the inherently dynamic and competitive nature of freelance work, where individuals bear primary responsibility for maintaining employability, securing clients, and adapting to changing demand conditions.

The analysis also underscores the critical role of competencies beyond technical expertise. Communication skills, teamwork capabilities, and digital literacy emerge as

essential for successful participation in platform-mediated and client-driven work environments. Importantly, these competencies are often developed outside formal education systems, with freelancers relying heavily on experiential learning, online resources, and self-directed skill development. This highlights a growing mismatch between traditional education pathways and the realities of freelance careers.

Furthermore, the study demonstrates that freelancer success is shaped not only by individual skills but also by the structure of market access channels. Differences in reliance on digital platforms, social networks, and personal contacts reflect diverse national models of client acquisition, which in turn influence professional practices and competence development.

Despite these challenges, freelancers remain broadly optimistic about the future of their work, although optimism is often tempered by uncertainty. This "cautious optimism" reflects a recognition of both expanding opportunities and persistent structural risks.

From a policy and strategic perspective, the findings point to the need for targeted, flexible, and context-sensitive interventions. Training programs should move beyond purely technical skills and incorporate competencies related to communication, client management, adaptability, and professional resilience. At the same time, support mechanisms should address structural challenges, including income stability, access to social protection, and integration into global markets.

In conclusion, freelancing represents a dynamic and evolving form of work that requires a holistic understanding of competencies, market structures, and institutional contexts. By providing an evidence-based comparative perspective, this report contributes to the development of more effective policies and educational frameworks aimed at supporting freelancers in achieving sustainable and competitive careers in the digital economy.

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Appendixes

Appendix 1: Semi-structured interview guide - Freelancers

Section 1: Introductory questions

Q1. Age?

Q2. Country of residence?

Q3. Years of experience as a freelancer?

Q4. What type of services do you offer as a freelancer?

Q5. In what industries or domains are your clients usually operating?

Q6. What are the typical characteristics of your client companies (e. g., size, department you work with, location)?

Q7. Through what channels do you usually find freelance work?

Section 2: Main interview questions

Q8. What competences or skills do you consider most important in your freelance work?

Q9. Do you believe there are competences that are essential for all freelancers, regardless of their field?

Q10. Have any clients ever mentioned skills you were lacking or areas for improvement?

Q11. How do you keep your skills up to date or stay competitive in the freelance market?

Q12. How is the use of AI technology changing your work?

Q13. What are the biggest challenges or risks you face as a freelancer?

Q14. What motivates you to continue freelancing instead of seeking full-time employment?

Q15. How has your experience as a freelancer evolved over time?

Q16. Have you noticed an increase in demand for your freelance services in recent years?

Q17. Have you worked with global clients or companies with international scope? If so, how does that differ from working with local clients?

Appendix 2. Semi-structured interview guide – Company representatives

Section 1: Introductory questions

Q1. Country of operation?

Q2. Industry sector?

Q3. Your role/position in the company?

Q4. Department in which you work?

Q5. How many years has your company been in the market?

Q6. Approximate size of the company (number of employees including freelancers)?

Q7. Does your company regularly hire freelancers? If so, in what areas or for what types of tasks?

Section 2: Main interview questions

Q8. Which competences do you consider most important when selecting a freelancer?

Q9. What competences or skills do you find are most lacking among freelancers you have hired?

Q10. Are there any competences that you believe are universally important across different freelance roles?

Q11. How do you usually find and select freelancers (what are the main criteria of selection; do you use agents/intermediaries for finding freelancers)?

Q12. How is the use of AI technology influencing the engagement of freelancers?

Q13. What are the advantages and disadvantages of working with freelancers compared to full-time employees?

Q14. What are the main benefits, from your perspective, associated with hiring freelancers?

Q15. What are the main risks, from your perspective, associated with hiring freelancers?

Q16. Has your company developed any specific strategy or policy related to freelance hiring?

Q17. Have you observed an increase in the demand for freelance work in your field in recent years? Why or why not?

Q18. What internal or external factors have most influenced the growth of freelance hiring in your company?

Q19. What internal or external barriers have most impeded the growth of freelance hiring in your company?

Appendix 3. Interviews - Classification matrix of freelancers

Participant	Age	Experience as freelancer (in years)	Experience in intervals
[ES-AS]	More than 35	20	10 or more
[ES-EM]	More than 35	18	10 or more
[ES-VC]	Less than 35	4	Less than 10
[IDN-LNA]	More than 35	10	10 or more
[IDN-NID]	Less than 35	2	Less than 10
[IDN-PA]	Less than 35	6	Less than 10
[PL-DS]	Less than 35	2	Less than 10
[PL-JS]	More than 35	28	10 or more
[PL-MJ]	Less than 35	2	Less than 10
[RO-AN]	More than 35	3	Less than 10
[RO-AT]	More than 35	20	10 or more
[RO-RC]	Less than 35	10	10 or more
[RS-AZ]	Less than 35	3	Less than 10
[RS-US]	Less than 35	2	Less than 10
[RS-VA]	Less than 35	2	Less than 10
[UA-OC]	More than 35	15	10 or more
[UA-OS]	Less than 35	2	Less than 10
[UA-VP]	More than 35	13	10 or more

Appendix 4. Interviews - Classification matrix of companies hiring freelancers

Participant	Size	Experience in intervals
[ES-AM-IA]	SME	Less than 14
[IDN-PT-JCS]	SME	15 or more
[PL-ND-MQ]	LE	Less than 14
[RO-CT-SCA]	LE	15 or more
[RS-AB-AMATG]	SME	Less than 14
[UA-SZ-UC]	SME	15 or more

Appendix 5. Survey questionnaire for freelancers

Appendix 6. Survey questionnaire for companies

We are pleased to invite you to take part in a survey on freelancing, conducted as part of the ENTEEF project - Fostering Entrepreneurship through Freelancing. This initiative aims to strengthen students' entrepreneurial skills by preparing them for freelance careers, while also promoting lifelong learning. You can find a detailed overview of the project here: https://enteef.uek.krakow.pl

Please note that the survey is completely anonymous. All responses will be published in aggregate form only, ensuring that no individual participant can be identified. The survey should take no more than 15 minutes to complete.

A1. Are you working or have worked as a freelancer in the past five years?

- [ ] Yes
- [ ] No

B1. Please, indicate your country of origin / nationality

B2. Please, indicate your country of residence

B3. Age

- [ ] Under 24
- [ ] 24-28
- [ ] 29-36
- [ ] 37-44
- [ ] 45-52
- [ ] 53-60
- [ ] 61 or more

B4. Gender

- [ ] Male
- [ ] Female
- [ ] Prefer not to say

B5. Highest level of education

- [ ] High school or less
- [ ] Bachelor's degree
- [ ] Master degree
- [ ] Doctorate or equivalent

B6. Area of education

- [ ] Education
- [ ] Arts and humanities (including languages, history, philosophy)
- [ ] Social Sciences, Journalism and Information
- [ ] Business, Administration and Law
- [ ] Natural Sciences, Mathematics and Statistics
- [ ] Information and Communication Technologies (ICTs)
- [ ] Engineering, Manufacturing and Construction
- [ ] Agriculture, Forestry, Fisheries and Veterinary
- [ ] Health and Welfare
- [ ] Services (e.g., tourism, sports, beauty)
- [ ] No formal education / Self-taught

B7. Number of languages spoken fluently (excluding mother tongue):

- [ ] none
- [ ] 1
- [ ] 2
- [ ] 3
- [ ] 4
- [ ] 5
- [ ] more than 5

B8. Main area of freelancer activity

- [ ] Creative and Multimedia
- [ ] Software Development and Information Technology
- [ ] Sales and Marketing Support
- [ ] Professional Services (e.g. consulting, accounting, finance, legal, …)
- [ ] Writing and Translation
- [ ] Clerical and Data Entry
- [ ] Technical Engineering
- [ ] Teaching
- [ ] Other

Other

B9. Years of experience as a freelancer

- [ ] Less than 1 year
- [ ] 1–5 years
- [ ] 6–10 years
- [ ] More than 10 years

B10. Freelancer status

- [ ] Main job (more than 30h per week)
- [ ] Part time job (less than 30h per week)
- [ ] Occasional activity (from time to time)

B11. Number of clients in the past 12 months

B12. How do you find jobs?

- [ ] Digital labour platforms
- [ ] Using social networks
- [ ] Via agency I cooperate with

- [ ] Via personal recommendation or contacts
- [ ] Via professional networking sites
- [ ] Via personal website
- [ ] Other

Other

B13. Digital labour platforms used to find jobs

- [ ] Upwork
- [ ] Freelancer.com
- [ ] Fiverr
- [ ] Toptal
- [ ] PeoplePerHour
- [ ] Guru.com
- [ ] Workana
- [ ] Other

Other

B14. Social networks used to find jobs

- [ ] LinkedIn
- [ ] Facebook
- [ ] TikTok
- [ ] Other

Other

C1. Please assess your proficiency (1 – beginner, 5 - master) and the importance (1 – not important, 5 – extremely important) of skills related to your personal profile.
Self-assessment

	1	2	3	4	5
Self-organization and work discipline	☐	☐	☐	☐	☐
Dealing with uncertainty and stress	☐	☐	☐	☐	☐
Ability to engage in and maintain relationships	☐	☐	☐	☐	☐
Ability to learn quickly and expand knowledge	☐	☐	☐	☐	☐
Experience in the work domain	☐	☐	☐	☐	☐
Ability to identify, analyse and solve problems	☐	☐	☐	☐	☐
Knowledge of and compliance with formal regulations (e.g. law, taxes, accounting)	☐	☐	☐	☐	☐
Ability to manage personal finance (budgeting, savings, investing)	☐	☐	☐	☐	☐

C2. Please assess your proficiency (1 – beginner, 5 - master) and the importance (1 – not important, 5 – extremely important) of skills related to your personal profile.
Importance

	1	2	3	4	5
Self-organization and work discipline	☐	☐	☐	☐	☐
Dealing with uncertainty and stress	☐	☐	☐	☐	☐
Ability to engage in and maintain relationships	☐	☐	☐	☐	☐
Ability to learn quickly and expand knowledge	☐	☐	☐	☐	☐
Experience in the work domain	☐	☐	☐	☐	☐
Ability to identify, analyse and solve problems	☐	☐	☐	☐	☐
Knowledge of and compliance with formal regulations (e.g. law, taxes, accounting)	☐	☐	☐	☐	☐
Ability to manage personal finance (budgeting, savings, investing)	☐	☐	☐	☐	☐

C3. Please assess your proficiency (1 – beginner, 5 - master) and the importance (1 – not important, 5 – extremely important) of skills related to communication and work in a team.

Self-assessment

	1	2	3	4	5
Clarity of expression while communicating with others	☐	☐	☐	☐	☐
Courage and assertiveness in communication	☐	☐	☐	☐	☐
Self-promotion and brand building	☐	☐	☐	☐	☐
Understanding of multi-cultural environment	☐	☐	☐	☐	☐
Ability to keep good relationships in business collaboration	☐	☐	☐	☐	☐
Right prioritization and task management	☐	☐	☐	☐	☐
Ability to work in a team	☐	☐	☐	☐	☐
Negotiation skills	☐	☐	☐	☐	☐

C4. Please assess your proficiency (1 – beginner, 5 - master) and the importance (1 – not important, 5 – extremely important) of skills related to communication and work in a team.

Importance

	1	2	3	4	5
Clarity of expression while communicating with others	☐	☐	☐	☐	☐
Courage and assertiveness in communication	☐	☐	☐	☐	☐
Self-promotion and brand building	☐	☐	☐	☐	☐
Understanding of multi-cultural environment	☐	☐	☐	☐	☐
Ability to keep good relationships in business collaboration	☐	☐	☐	☐	☐
Right prioritization and task management	☐	☐	☐	☐	☐
Ability to work in a team	☐	☐	☐	☐	☐
Negotiation skills	☐	☐	☐	☐	☐

C5. Please assess your proficiency (1 – beginner, 5 - master) and the importance (1 – not important, 5 – extremely important) of skills in digital literacy skills.
Self-assessment

	1	2	3	4	5
Ability to assess the relevance of online information	☐	☐	☐	☐	☐
Ability to use cloud-based project management tools (e.g., Trello, Asana)	☐	☐	☐	☐	☐
Use of a cloud-based storage system (e.g. Dropbox, Google Drive) to share material with other members of my group	☐	☐	☐	☐	☐
Choosing right tools for effective collaboration (e.g. online spaces for co-creation, shared project management tools)	☐	☐	☐	☐	☐
Use of search engines, social media and content platforms	☐	☐	☐	☐	☐
Use of digital labour platforms (choice of the right platform, registration, search and application for job, communication over platform, etc.)	☐	☐	☐	☐	☐
Use of AI tools	☐	☐	☐	☐	☐

C6. Please assess your proficiency (1 – beginner, 5 - master) and the importance (1 – not important, 5 – extremely important) of skills in digital literacy skills.
Importance

	1	2	3	4	5
Ability to assess the relevance of online information	☐	☐	☐	☐	☐
Ability to use cloud-based project management tools (e.g., Trello, Asana)	☐	☐	☐	☐	☐
Use of a cloud-based storage system (e.g. Dropbox, Google Drive) to share material with other members of my group	☐	☐	☐	☐	☐
Choosing right tools for effective collaboration (e.g. online spaces for co-creation, shared project management tools)	☐	☐	☐	☐	☐
Use of search engines, social media and content platforms	☐	☐	☐	☐	☐
Use of digital labour platforms (choice of the right platform, registration, search and application for job, communication over platform, etc.)	☐	☐	☐	☐	☐
Use of AI tools	☐	☐	☐	☐	☐

D1. How do you usually charge for your freelance work?

- [ ] Hourly rate
- [ ] Fixed price per project
- [ ] Other

Other

D2. Typical hourly rate

- [ ] Less 10 €
- [ ] €10–19
- [ ] €20–29
- [ ] €30–39
- [ ] €40–49
- [ ] 50 € or more
- [ ] Prefer not to say

D3. Taking into account one-year period, compared to a salaried job, do you earn

- [ ] More
- [ ] About the same
- [ ] Less

D4. Top 3 challenges you face in the near future

- [ ] Changes in customer expectations and contracts
- [ ] Market changes that could reduce demand or replace us
- [ ] To secure consistent, constant income
- [ ] Increasing project complexity
- [ ] Need to upskill and keep up with trends
- [ ] To keep resilience, discipline, and mindset needed to thrive long-term

Other ☐

Other

E1. **What factors do you think are driving the growth of freelancing? (select up to 3)**

Technological advances ☐

Worker lifestyle preferences ☐

Business flexibility need ☐

Economic shifts ☐

Globalization ☐

Other ☐

Other

E2. **How do you feel about the future of freelancing in your field?**

Very optimistic ☐

Somewhat optimistic ☐

Neutral ☐

Somewhat pessimistic ☐

Very pessimistic ☐

E3. **How often will you use AI in your work as a freelancer in the next 5 years?**

Regularly ☐

Often ☐

Occasionally ☐

Rarely ☐

Never ☐

E4. How often do you invest in upskilling or reskilling?

- [ ] Regularly
- [ ] Often
- [ ] Occasionally
- [ ] Rarely
- [ ] Never

E5. How do you improve or acquire new skills?

- [ ] Online sources
- [ ] Offline courses
- [ ] From universities / formal education
- [ ] Work experience
- [ ] Other

Other

F1. If you would like to be informed about the research results, please provide your email address.

By providing us with your email address, you consent to the processing of your personal data. Information regarding the controller of your personal data is included in the Privacy Policy available here: Privacy Policy – Krakow University of Economics.

We are pleased to invite you to take part in a survey on freelancing, conducted as part of the ENTEEF project — Fostering Entrepreneurship through Freelancing. This initiative aims to strengthen students' entrepreneurial skills by preparing them for freelance careers, while also promoting lifelong learning and the use of microcredentials. You can find a detailed overview of the project here: https://enteef.uek.krakow.pl

Please note that the survey is completely anonymous. All responses will be published in aggregate form only, ensuring that no individual participant can be identified. The survey should take no more than 15 minutes to complete.

A1. **Has your company ever hired a freelancer (particularly a self-employed person who works remotely part-time or full-time)?**

- [ ] YES
- [ ] NO

B1. **Country of headquarters:**

B2. Choose the main area of your activity (following NACE statical classification)

- [ ] Agriculture, forestry and fishing
- [ ] Mining and quarrying
- [ ] Manufacturing
- [ ] Electricity, gas, steam and air conditioning supply
- [ ] Water supply
- [ ] Construction
- [ ] Wholesale and retail trade
- [ ] Transportation and storage
- [ ] Accommodation and food service activities
- [ ] Publishing, broadcasting, and content production and distribution activities
- [ ] Telecommunication, computer programming, consulting, computing infrastructure and other information service activities infrastruktura i ostale informacione uslužne delatnosti
- [ ] Financial and insurance activities
- [ ] Real estate activities
- [ ] Professional, scientific and technical activities
- [ ] Administrative and support service activities
- [ ] Public administration and defence
- [ ] Education
- [ ] Human health and social work activities
- [ ] Arts, sports and recreation
- [ ] Other service activities
- [ ] Activities of households as employers and undifferentiated goods- and service-producing activities of households for own use
- [ ] Activities of extraterritorial organisations and bodies

B3.

Size of a company

- [ ] Micro (1–9 employees)
- [ ] Small (10–49)
- [ ] Medium (50–249)
- [ ] Large (250+)

B4. Years active in the market:

B5. Market of operations

- [ ] Local (e.g. country)
- [ ] Regional (e.g. Europe, Asia)
- [ ] Global

B6. Form of company ownership

- [ ] Domestic
- [ ] Foreign ownership

B7. Which is your role/department in the company:

- [ ] Executive (CEO, CFO, etc.)
- [ ] Manager
- [ ] Team Lead / Supervisor
- [ ] Specialist / Analyst
- [ ] Administrative / Support Staff
- [ ] Technician / Developer
- [ ] Sales / Marketing
- [ ] Customer Service
- [ ] Other

Other

C1. Has your company hired freelancers in the past 12 months?

- [ ] Yes
- [ ] No

C2. How long has your company been hiring freelancers (in years)?

C3. Type of freelance services hired (select all that apply):

- [ ] Creative and Multimedia
- [ ] Software Development and Information Technology

- [ ] Sales and Marketing
- [ ] Professional Services
- [ ] Writing and Translation
- [ ] Clerical and Data Entry
- [ ] Technical Engineering
- [ ] Teaching and Training
- [ ] Other

Other

D1. Please assess the degree to which freelancers you hire meet your standards (1 – do not meet your standards at all, 5- meet all your standards) and the importance (1 – not important, 5 – extremely important) of skills related to personal profile.
Degree of meeting standards

	1	2	3	4	5
Self-organization and work discipline	☐	☐	☐	☐	☐
Dealing with uncertainty and stress	☐	☐	☐	☐	☐
Ability to engage in and maintain relationships	☐	☐	☐	☐	☐
Ability to learn quickly and expand knowledge	☐	☐	☐	☐	☐
Experience in the work domain	☐	☐	☐	☐	☐
Ability to identify, analyse and solve problems	☐	☐	☐	☐	☐
Knowledge of and compliance with formal regulations (e.g. law, taxes, accounting)	☐	☐	☐	☐	☐
Ability to manage personal finance (budgeting, savings, investing)	☐	☐	☐	☐	☐

D2. Please assess the degree to which freelancers you hire meet your standards (1 – do not meet your standards at all, 5- meet all your standards) and the importance (1 – not important, 5 – extremely important) of skills related to personal profile.
Importance

	1	2	3	4	5
Self-organization and work discipline	☐	☐	☐	☐	☐

	1	2	3	4	5
Dealing with uncertainty and stress	☐	☐	☐	☐	☐
Ability to engage in and maintain relationships	☐	☐	☐	☐	☐
Ability to learn quickly and expand knowledge	☐	☐	☐	☐	☐
Experience in the work domain	☐	☐	☐	☐	☐
Ability to identify, analyse and solve problems	☐	☐	☐	☐	☐
Knowledge of and compliance with formal regulations (e.g. law, taxes, accounting)	☐	☐	☐	☐	☐
Ability to manage personal finance (budgeting, savings, investing)	☐	☐	☐	☐	☐

D3. Please assess the degree to which freelancers you hire meet your standards (1 – do not meet your standards at all, 5- meet all your standards) and the importance (1 – not important, 5 – extremely important) of skills related to communication and work in a team. Degree of meeting standards

	1	2	3	4	5
Clarity of expression while communicating with others	☐	☐	☐	☐	☐
Courage and assertiveness in communication	☐	☐	☐	☐	☐
Self-promotion and brand building	☐	☐	☐	☐	☐
Understanding of multi-cultural environment	☐	☐	☐	☐	☐
Ability to keep good relationships in business collaboration	☐	☐	☐	☐	☐
Right prioritization and task management	☐	☐	☐	☐	☐
Ability to work in a team	☐	☐	☐	☐	☐
Negotiation skills	☐	☐	☐	☐	☐

D4. Please assess the degree to which freelancers you hire meet your standards (1 – do not meet your standards at all, 5- meet all your standards) and the importance (1 – not important, 5 – extremely important) of skills related to communication and work in a team. Importance

	1	2	3	4	5
Clarity of expression while communicating with others	☐	☐	☐	☐	☐
Courage and assertiveness in communication	☐	☐	☐	☐	☐

	1	2	3	4	5
Self-promotion and brand building	☐	☐	☐	☐	☐
Understanding of multi-cultural environment	☐	☐	☐	☐	☐
Ability to keep good relationships in business collaboration	☐	☐	☐	☐	☐
Right prioritization and task management	☐	☐	☐	☐	☐
Ability to work in a team	☐	☐	☐	☐	☐
Negotiation skills	☐	☐	☐	☐	☐

D5. Please assess the degree to which freelancers you hire meet your standards (1 – do not meet your standards at all, 5- meet all your standards) and the importance (1 – not important, 5 – extremely important) of skills in digital literacy skills.
Degree of meeting standards

	1	2	3	4	5
Ability to assess the relevance of online information	☐	☐	☐	☐	☐
Ability to use cloud-based project management tools (e.g., Trello, Asana)	☐	☐	☐	☐	☐
Use of a cloud-based storage system (e.g. Dropbox, Google Drive) to share material with other members of my group	☐	☐	☐	☐	☐
Choosing right tools for effective collaboration (e.g. online spaces for co-creation, shared project management tools)	☐	☐	☐	☐	☐
Use of search engines, social media and content platforms	☐	☐	☐	☐	☐
Use of digital labour platforms (choice of the right platform, registration, search and application for job, communication over platform, etc.)	☐	☐	☐	☐	☐
Use of AI tools	☐	☐	☐	☐	☐

D6. Please assess the degree to which freelancers you hire meet your standards (1 – do not meet your standards at all, 5- meet all your standards) and the importance (1 – not important, 5 – extremely important) of skills in digital literacy skills.
Importance

	1	2	3	4	5
Ability to assess the relevance of online information	☐	☐	☐	☐	☐
Ability to use cloud-based project management tools (e.g., Trello, Asana)	☐	☐	☐	☐	☐
Use of a cloud-based storage system (e.g. Dropbox, Google Drive) to share material with other members of my group	☐	☐	☐	☐	☐

	1	2	3	4	5
Choosing right tools for effective collaboration (e.g. online spaces for co-creation, shared project management tools)	☐	☐	☐	☐	☐
Use of search engines, social media and content platforms	☐	☐	☐	☐	☐
Use of digital labour platforms (choice of the right platform, registration, search and application for job, communication over platform, etc.)	☐	☐	☐	☐	☐
Use of AI tools	☐	☐	☐	☐	☐

E1. Why does your company choose to hire freelancers? (Select up to 3):

- ☐ Cost-effectiveness
- ☐ Faster delivery
- ☐ Access to skills not in-house
- ☐ Flexibility
- ☐ Legal/employment structure
- ☐ Other

Other

E2. What are the risks of relying on freelancers?

- ☐ Integration & communication challenges (with team, clients)
- ☐ Risk of project delays / unreliability
- ☐ Lack of control and transparency
- ☐ Unavailability
- ☐ Inconsistent work quality and rework needs
- ☐ Data breaches and leaks
- ☐ Intellectual property breaches
- ☐ Tax and labour law violations
- ☐ Payment disputes

Other

Other

E3. Top 3 challenges you face in the near future

- Changes in freelancers' expectations
- Market / social changes that could reduce availability of freelancers
- Increased costs of freelancers' engagement
- Increasing project complexity
- Availability of freelancers with required competences
- New generation attitude to work-life balance
- Other

Other

E4. How will the use of AI influence hiring freelancers in your company?

- Hiring more freelancers
- No effect
- Hiring less freelancers

E5. How is the use of AI technology influencing the freelancing market?

F1. If you would like to be informed about the research results, please provide your email address