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FREELANCING IN THE KAZAKHSTAN MARKET: NEW OPPORTUNITIES

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ABSTRACT

The purpose of the research. Assessment of the real volume of the freelance services market, the scale of freelancing in the Kazakh labor market based on the available official data from the information systems.

Methodology includes the use of methods: statistical and quantitative analysis of labor market indicators; qualitative analysis in reviewing the works of domestic and foreign scientists on the topic of research; graphic methods of visualizing the results of the study.

Originality/value of the research. The paper offers the results of the analysis of the current state and key problems of Kazakhstan's freelancing market; it assesses the scale of domestic freelancing, considered new prospects for the development of freelance, its social and economic role in solving the problems of reducing unemployment and ensuring employment of the population.

Findings. Freelancing in Kazakhstan is currently not widespread and has little impact on the labor market, although many freelancers are still out of the picture. The freelance services market is closely interconnected with the situation on the labor market. Rather high level of unemployment, lack of opportunity to get a job in their specialty force people to this type of employment.

Keywords: freelance, freelancers, labor market, Kazakhstan.

INTRODUCTION

Globalization, the development of technology, the change of generations and their preferences, and the COVID-19 pandemic have given rise to the rapid growth of non-standard forms of employment. Traditional wage employment is shifting to the freelance economy, or freelancing, which has become an integral part of the labor market.

Many organizations outsource tasks to freelancers that full-time employees cannot perform. Short-term relationships with performers avoid the lengthy process of selecting and hiring workers with a certain skill set that may no longer be in demand in the future. Thanks to this business reduces the cost of personnel and infrastructure (rental of premises, computers, equipment, etc.) by hiring freelancers for specific projects and paying them based on the results.

Literature review. Flexible forms of employment are now popular as it allows people to work efficiently [1]. We believe that the popularity of freelancing has been impacted by pandemic restrictions. Freelancing promotes the commercialization of new technologies, as well as the creation of conditions for their widespread use [2]. The emergence of freelancers in the labor market was facilitated by major changes at different levels: economic, technological, sociocultural [3].

Freelancer as a subject of the labor market is a new type of "free" worker ("free worker") who is not in standard (traditional) social and labor relations with the organization and provides its services mainly through the use of special electronic platforms and information and communication technologies [4].

We agree with D. Bögenhold, A. Klinglmaier, O. Ajayi-Obe and S. C. Parker, who argued that significant changes are taking place in the field of self-employment, the scale of which leads to the formation of a new standard of employment, organization of labor and labor relations in the knowledge economy and in the entrepreneurial market; freelancing has become this new standard, which contributes to the development of the economy [5: 6].

The future of the emerging “freelance economy” is outlined in a report from the Roosevelt Institute and the Kauffman Foundation, which forecasts freelancing will dominate the labor market by 2040 [7].

We can agree with experts about the main trends of the new economy:

1. The work will be in the nature of short-term projects carried out by professionals working in several companies at once with irregular working hours.
2. New levers will be created to reduce economic risks, which will displace traditional pensions and health insurance.
3. Development of freelance portals, which will contain all the information about the supply and demand for freelance services, and thanks to which it will be possible to plan and keep records of ongoing freelance projects [7].

A great influence on the development of self-employment and freelancing has a growing population. According to forecasts, by 2030, the world population will reach 8-8.3 billion people, with urban population increasing by 48-58%, reaching 4.7-5.0 billion people, while the peak of annual urban population growth will be in the period of 2020-2025, reaching a maximum growth rate of 6.9 million people per year [8]. Another demographic factor that self-employment researchers pay attention to is the increase in life expectancy in developed countries, as some retirees continue to work as self-employed [9].

Studies show that job satisfaction as a self-employed person and the choice of this form of entrepreneurship are related to personal qualities and values, primarily independence and autonomy [10]. Therefore, the impetus for the development of freelancing, in our opinion, was the spread of information and communication technologies, which greatly expanded the possibilities of performing non-physical work at any distance, at any time, from any geographical point [11].

We believe that new information technologies have created conditions for self-organization of suppliers and consumers of freelance services in the virtual space. And of course, special freelance exchanges play a special role - electronic trading platforms for organizing the interaction of buyers and sellers of freelance services.

THE MAIN PART OF THE RESEARCH

When working as a freelancer, a person decides for himself when to work, where to work, who to work with, and how much his work costs, based on his knowledge and skills in the market.

Why people choose freelancing and what risks arise from such employment are presented in Figure 1.

Why Choose Freelancing?			What are the risks of such employment?
Low barriers to entry	Combination with the main work	Work in the global labor market	<ul style="list-style-type: none"> • Unstable employment and income, high competition • Non-compliance with payment terms by the customer • Irregular work schedule • Most of the settlements on the platforms happen "from hand to hand" • No incentives to formalize employment, unattractive tax regimes • Limited rights to unemployment benefits, temporary disability, paid leave • No accident insurance • Low opportunities for career development • Due to the lack of social guarantees, employees are more exposed to social risks • Restrictions on the ability to organize in trade unions
Working time flexibility	Autonomy, little control	Career and personal life balance	
Employment opportunities for youth, women, people of pre-retirement age	Freedom in choosing projects/tasks	Quick income, setting your own price for work	

Figure 1 – Why Choose Freelancing?

Note - compiled by the authors

It is possible to choose one or more projects independently and do them independently. In addition, freelancing opens up new opportunities also for those who some 20 years ago could not be involved in quality employment due to disability, illness or the need to care for family

What's more, every engaged worker has become a "global worker" - jobs can be found without the geographical constraints of where he or she lives. Today, a good computer or big data specialist can live in Kazakhstan, but fulfill orders for a company located in the United States. The rapid development of digital technologies has made this possible.

At the same time, there are risks associated with the development of such processes. For example, freelance workers most often remain outside the systems of social protection, are to some extent limited in labor rights usually provided by traditional employment, such as annual leave, sick leave, advanced training, etc., and, according to studies of the International Labor Organization (ILO), receive less than the official minimum wage [12].

Gig economy workers are responsible for their own personal expenses. While these can be written off as non-work-related personal expenses, it is important to remember that these expenses affect both work-related and personal issues. This can also include professional development expenses. Ironically, for a freelancer, qualifications and being on the cutting edge of labor market trends are extremely important for successful work, and skill development costs, if not money, then time, and this time will not be paid [13].

Also, flexible working hours and self-organization in a precarious work environment increase the risk of professional burnout, as tasks can be performed outside of hours, at the last moment before a deadline, and can become tedious as they are repeated, damaging the freelancer's health. Such employment forces workers to do more work than the original volume in order to increase their rating and attract more customers.

In Table 1, let's look at four groups of freelance workers.

Table 1 – Four categories of freelancers

Freelance is:	Basic Income	Additional income
Self-selection	<i>Free agents</i> choose their own job and receive their main income from it. Example: Self-employed plumber or therapist in private practice	<i>Temporary workers</i> use their jobs as a source of additional income. Example: an artist who sells paintings
Necessity	<i>Forced freelancers</i> would like to have a traditional job, but are now forced to earn money through independent work	<i>With financial difficulties</i> , perform additional independent work as needed to make ends meet. Example: janitor who is part-time painter on the weekends
Note - compiled by the authors		

According to the Payoneer study, the average hourly wage of freelancers in the world is \$28, and the gender pay gap is 18% - women receive an average of \$23 per hour [14].

The most common professions among freelancers that are not tied to a place of work tend to include copywriters, content makers, editors, translators, designers, IT specialists, marketers or SMM specialists.

According to Freelancer.com, most companies are looking for people who are experts in:

- content creation, writing and virtual animation;
- information technology and programming;
- marketing and digital sales;
- graphic design; multimedia editors [15].

Popular freelancing platforms are Upwork, Fiverr, Toptal, Simply Hired, PeoplePerHour, Aquent, Crowd-ed, The Creative Group, 99Designs, Nexxt, TaskRabbit. In addition, the growing role of social media as a marketplace for orders cannot be overlooked. Already today, Facebook, LinkedIn, Instagram and YouTube continue to gain popularity among freelancers.

If we talk about Kazakhstan, the most common ecosystems are Yandex.kz, InDrive, Wolt, Glovo, Choco-food.kz, Allfreelance.kz, Upwork.kz, Megamaster.kz, Naimi.kz, Freelancehunt.kz, Ozat.kz and others.

Freelancing, combining the features of both wage labor and the characteristics of self-employment, requires, first of all, the classification and determination of the status of this category of workers. Provision of their social protection is complicated by a number of difficulties.

First, self-employed workers are not in an employment relationship with specific employers who would be responsible for providing social benefits and guarantees if they signed a contract.

Secondly, freelancers at any moment can find themselves in the role of an employer from the moment they hire another worker.

Thirdly, the activity of freelancers is usually short-term. Only when performing long-term projects does the need to establish a contractual relationship arise. At the same time nonuniformity of conditions and the amount of wages hinders the unification of this category of workers into trade unions.

Fourthly, it is up to the self-employed to ensure safe work for them. Classification of an accident when it occurs is carried out outside the limits of the labor legislation.

Fifth, self-employed workers do not seek to burden themselves with insurance obligations. The exception is compulsory types, such as motor vehicle liability insurance.

Today it is rather difficult to estimate the real volume of the freelance services market not only in the world, but also in RK. Nevertheless, this market will continue to gain momentum, because it is convenient for freelancers and profitable for employers.

Despite the fact that today the official statistics assumes the employment of 524 thousand independent workers and 65 thousand workers under the contract of civil-law character based on the data of sample survey of population, it is impossible to estimate the real scale of freelancing, including professions, approximate earnings or status in the social protection system today.

Freelancers who live in Kazakhstan and carry out orders for foreign companies may not have official pension or other social contributions, while receiving a salary from a non-resident employer and consider themselves unemployed. For example, a designer can periodically work with one private company, while being paid in cash, and this transaction will not be reflected anywhere. In addition, there are temporary freelancers who, in addition to their hired work, may occasionally provide their services on freelance platforms.

According to the Kazakh law, freelancers pay individual income tax and mandatory pension contributions (MPK) at source; however, unlike an employment contract, the employer does not pay social tax and social contributions. In addition, the activity of a freelancer in the conclusion of a civil-law contract is not a job under an employment contract, and therefore for employers, hiring freelancers is often more cost-effective than hiring a direct employee. In this case the freelancer has significantly fewer rights, as his activity does not fall under the labor legislation, and there are no obligations to pay social tax and social contributions.

In this connection the Ministry of Labor and Social Protection of the RK (MLSP) considers the question of establishing the nominal rate of payment of taxes and obligatory payments under the contract of civil-law character at the level of 34 %. This measure will ensure an adequate level of social security, as well as an adequate level of pension savings.

According to [16], collected from enterprises, the number of persons performing work under civil-law contracts increases every year. Compared to 2017, the growth of such workers was 40% in 2021, increasing to 176.9 thousand people (Figure 2).

Based on the official data of the MLSP RK, let us estimate the scale of freelancing. Thus, in 2021, 1,049 thousand people worked as freelancers in Kazakhstan.

This number of freelancers is determined on the basis of the current legislation, that is, taking into account the fact that they have mandatory pension contributions (FPL) in the absence of social contributions in the same month from the same entity present in the business register of legal entities and individual entrepreneurs.

In 2021 for 228,276 Kazakhstanis freelancing was the main way of earning, 820,515 people worked as both freelancers and employees.

At the same time the number of persons, whose income from freelancing accounted for 50% or more of their total income (i.e. predominantly freelancers), was 106,765, or 13% of their number. The number of persons whose share of income from freelancing is not more than 10% was 395,798 (48% of part-time workers), and not more than 20% was 554,215 (68%).

Thus, although freelancers accounted for 16.6% of total employment in 2021, only 3.6% of employees were pure freelancers in 2021, and for another 1.7%, freelance employment was the predominant source of income

compared to other wage employment. Accordingly, the share of persons for whom freelancing was the main source of income was 5.3% of employees, and their number was 335,041. At the same time, the average annual amount of transfers from pure freelancing is 66 % higher than from mixed freelancing – 57.2 thousand tenge against 34.4 thousand tenge respectively.

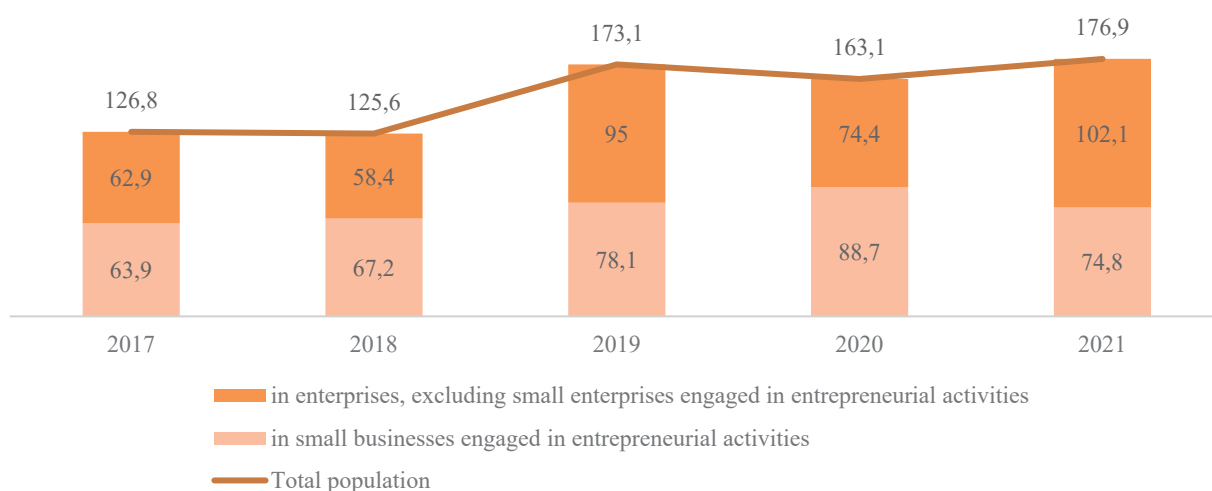


Figure 2 - The number of persons working under civil-law contracts in the Republic of Kazakhstan, 2017-2021, thousand people.

Note – compiled by the authors based on Source [16]

Among other major indicators characterizing the level of freelancing in Kazakhstan, it should be noted the number of facts of transfer of RTC, which amounted to 3.3 million units, the average monthly number of contracts for freelance services - 276.4 thousand units.

Average monthly number of freelancers in Kazakhstan reached 255.8 thousand in 2021. Average income was 124,000 tenge, median income was 65,000 tenge.

This indicates a large number of persons with a small amount of remuneration under the contract. At the same time, the peak of the number of freelancers came in June-July 2021 and at the end of the year, and the size of earnings (both average and median) has a steady tendency to increase [17].

The most frequent amount of OTP (397.8 thousand cases) is an amount of 4,250 tenge, which corresponds to a salary of 42,500 tenge, and an amount of 2,125 tenge (33.8 thousand cases). Amounts of 5 thousand tenge (77.2 thousand cases), 10 thousand tenge (52.1 thousand cases), 6 thousand tenge (32.9 thousand cases), 15 thousand tenge (31 thousand cases), 20 thousand tenge (26.2 thousand cases) are also frequent.

Contracts concluded between freelancers and employers seem to imply one-time payment or 1 time per month in overwhelming majority of cases, which account for 91.4% of cases of payment for services.

During 2021, 48% of freelancers worked for only one employer, 18% worked for two employers, and 10% worked for three employers.

At the same time, about 44% of freelancers (461,100 people) received only one payment during the year, another 35% (371,400 people) had two to four payments. Twenty-one percent of freelancers (216,300 people) had five or more payments, including 10 or more payments - only 7% (78,100 people).

Thus, according to the data from the information systems, freelancing in Kazakhstan at present is not widespread and in general has a rather weak impact on the labor market, however, as mentioned earlier, many freelancers remain out of sight.

It should be noted that among pure freelancers (for whom this is the only way to earn money) the share of young people is 35%, while among mixed (freelance and wage employment) - only 23%. In general, this situation may cause a certain concern for the quality of youth employment, because working exclusively under contracts of civil-legal nature, young people are often deprived of social guarantees from the state and will not be able to claim, for example, for some benefits in certain situations. In all likelihood, this situation is a consequence of the fact that young people prefer free hours or try to find any kind of job after training and do not have a wide choice of employers, while older people already have a certain experience and consider freelancing mainly as a wage supplement (Figure 3).

While the average annual income of pure freelancers only increases with age, the situation is different among mixed freelancers. The highest incomes were among pure freelancers of pre-retirement age.

On average, their income reaches 85.9 thousand tenge per year per person, which is exactly 1.5 times higher than the average and 1.9 times higher than among young people.

In terms of categories of employers, most freelancers work for legal entities (75%), with individual (personal) entrepreneurs accounting for another 19%.

At the same time, the average amount of payment for legal entities is 2.4 times higher than that for individual entrepreneurs, and freelancers' pay in branches of foreign legal entities is the highest among all categories (Figure 4).

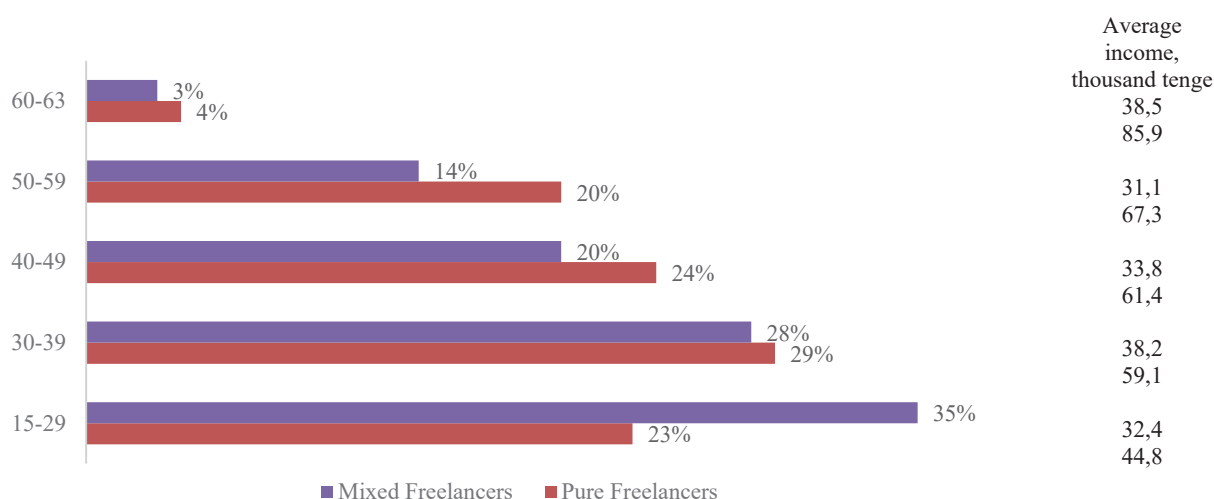


Figure 3 – Age groups and categories of freelancers

Note – compiled by the authors based on Source [17]

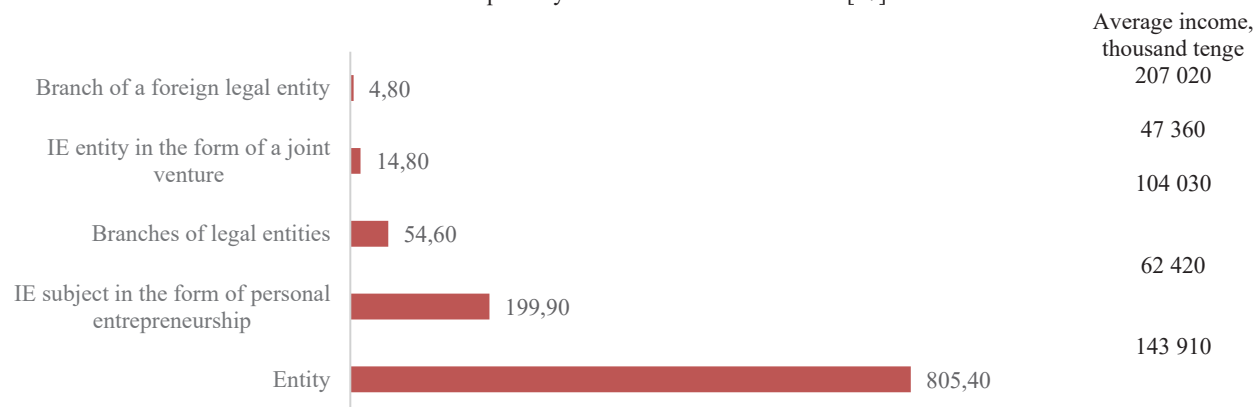


Figure 4 – Where Freelancers Worked in 2021

Note – compiled by the authors based on Source [17]

In the context of employer industries, the majority of freelancers were in education, trade (15% each), and the public administration and social security sectors (13%).

At the same time, the structure of the recruitment of freelancers by industry differs depending on their status; while for pure freelancers the main industries were trade (17%), other individual services (12%), and agriculture (11%), for mixed freelancers these were primarily the education sector (18%), public administration and social security (15%), and trade (14%) (Figure 5).

In turn, the highest income is characteristic to spheres of professional and scientific activity (average income of 211 KZT and median of 111 KZT), mining industry (average income of 209 KZT and median of 149 KZT), information and communication (188 and 93 KZT).

Regarding regions, Almaty, Astana and Shymkent together account for 41% of all freelancers, including Almaty alone - 22%.

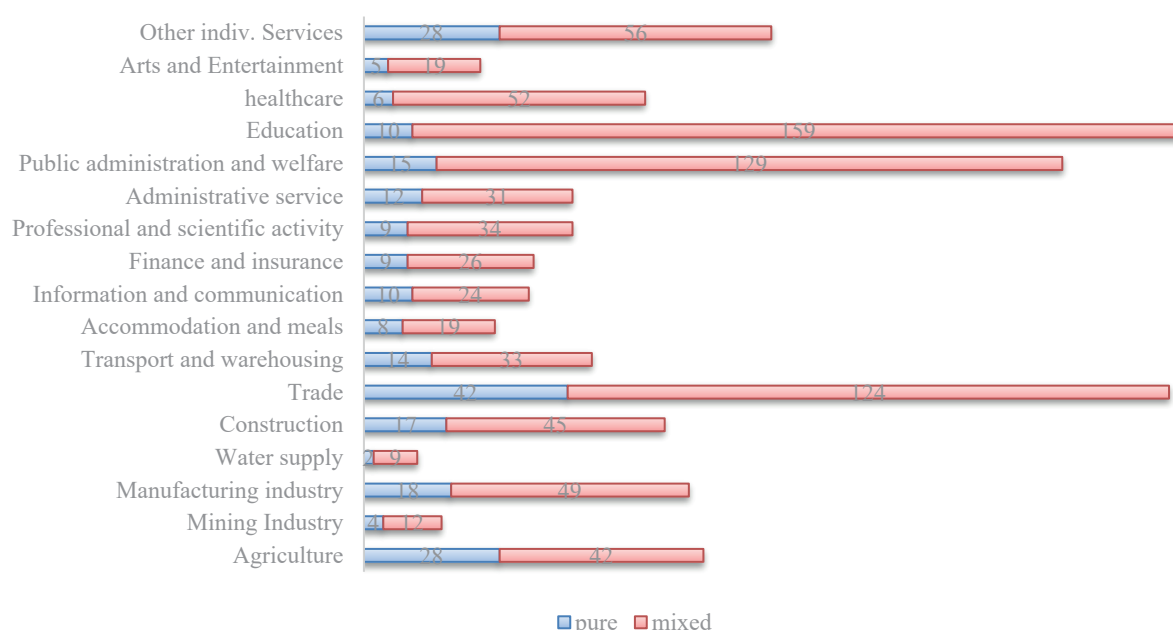


Figure 5 – The number of freelancers by industry in Kazakhstan in 2021, thousand people

Note – compiled by the authors based on Source [17]

At the same time the structure of distribution by region of pure and mixed freelancers in general is comparable to each other. If in Almaty the greatest share of freelancers in a branch section falls to sphere of trade (23 %), and also information and communications (11 %), then in capital freelancers are involved first of all in education (13 %), trade (12 %) and other individual services (11 %) (Figure 6).

The highest average income is also typical for Astana and Almaty cities, comprising 141% and 122% of the average for Kazakhstan in general, and Atyrau region (125%), the lowest – for Shymkent city and Turkestan region (60% and 68% respectively), and Kyzylorda region (69%). The freelance services market is closely connected with the situation on the labor market. Rather high level of unemployment and lack of opportunity to get a job in their specialty force people to this type of employment. The pandemic and the related unstable situation in the world economy have been reflected in the increasing desire of employers to save on fixed and transaction costs. At the same time, the transfer of most employees to remote work contributed to their competitiveness.

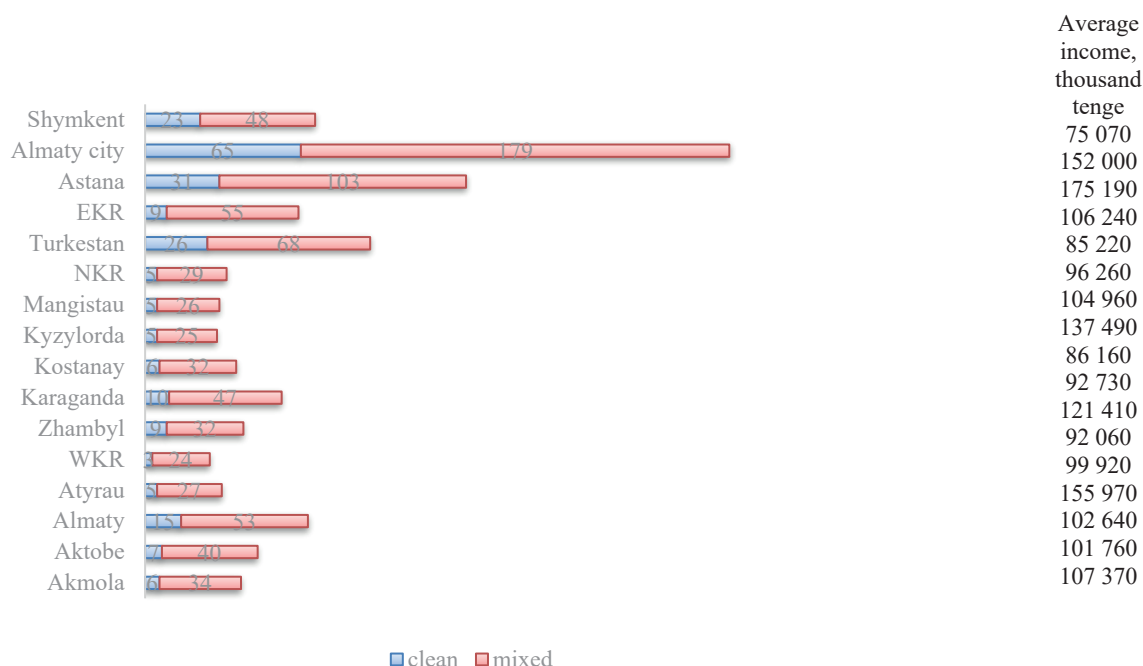


Figure 6 – The number of freelancers and their income by regions of Kazakhstan in 2021, thousand people
Note – compiled by the authors based on Source [17]

The development of the freelance services market promotes the development of unpromising regions. Freelancers have free schedule, comfortable working conditions, the ability to distribute and control their time, etc., but at the same time are highly dependent on market fluctuations; lack of regulations governing the relationship between freelancer and customer limits their access to social benefits and makes them socially unprotected.

OBTAINED RESULTS (CONCLUSIONS)

So, the sphere of official freelancing is underdeveloped in Kazakhstan, which indicates a large shadow market in this sector and the need to take measures for its legalization, regulation and social protection of this category of workers.

Promotion of development of the freelance services market in Kazakhstan should also be accompanied by creation of favorable conditions for work in this format. The development of information, communication infrastructure and improvement of digital literacy of the population will create opportunities for them to work remotely and search for projects through various freelance platforms.

Reducing the paperwork when working with freelancers will simplify the interaction between customers and performers through the improvement of electronic document management with the use of electronic payment systems, electronic signatures, etc.

By establishing a dialogue between the state and freelancers, regulating and forming a legislative framework, which allows to legalize freelancers, it will be possible to maximize the positive effect of freelancing for the labor market and for the economy as a whole.

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ҚАЗАҚСТАН НАРЫҒЫНДАҒЫ ФРИЛАНС: ЖАҢА МҮМКІНДІКТЕР

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АНДАТПА

Зерттеу мақсаты – ақпараттық жүйелерінен алынған ресми деректер негізінде фриланс нарығы қызметтерінің нақты көлемін, қазақстандық еңбек нарығындағы фриланс масштабын бағалау.

Әдіснама келесідей әдістерді қамтиды: еңбек нарығы көрсеткіштерінің статистикалық және сандық талдауы; зерттеу тақырыбы бойынша отандық және шетелдік ғалымдардың еңбектерін сапалы талдау; зерттеу нәтижелерін визуализациялаудың графикалық әдістері

Зерттеудің құндылығы. Жұмыста қазақстандық фриланс нарығының қазіргі жағдайы мен кілт мәселелерін талдау нәтижелері ұсынылған; отандық фриланс масштабтарына баға берілген, фрилансінгіті дамытудың жаңа перспективалары, оның жұмыссыздықты азайту және халықты жұмыспен қамтуды қамтамасыз ету мәселелерін шешудегі әлеуметтік-экономикалық рөлі қарастырылады..

Зерттеу нәтижелері. Бүгінгі таңда Қазақстанда фриланс кең таралмаған және еңбек нарығына нарығына ықпалы аз, десек те көптеген фрилансерлер назардан тыс қалуда. Фриланс қызметтері нарығы еңбек нарығындағы ахуалмен тығыз байланысты. Жұмыссыздықтың айтарлықтай жоғары деңгейі, мамандық бойынша жұмысқа орналасуға мүмкіндіктің болмауы адамдарды осы еңбек түрін таңдауға мәжбүрлейді.

Түйін сөздер: фрилансер, фрилансерлер, еңбек нарығы, Қазақстан.

ФРИЛАНС НА РЫНКЕ КАЗАХСТАНА: НОВЫЕ ВОЗМОЖНОСТИ

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АННОТАЦИЯ

Цель исследования – оценка реальных объемов рынка фриланс-услуг, масштабов фриланса на казахстанском рынке труда на основе имеющихся официальных данных из информационных систем.

Методология исследования включает использование методов: статистического и количественного анализа показателей рынка труда; качественного анализа при проведении обзора трудов отечественных и зарубежных ученых по теме исследования; графических методов визуализации результатов исследования.

Оригинальность / ценность исследования. В работе предложены результаты анализа современного состояния и ключевых проблем казахстанского рынка фриланса; дана оценка масштабам отечественного фриланса, рассмотрены новые перспективы развития фриланса, его социально-экономическая роль в решении проблем снижения безработицы и обеспечения занятости населения.

Результаты исследования. Фриланс в Казахстане в настоящее время не является широко распространенным и слабо влияет на рынок труда, хотя многие фрилансеры остаются все еще вне поля зрения. Рынок фриланс-услуг очень взаимосвязан со сложившейся ситуацией на рынке труда. Довольно высокий уровень безработицы, невозможность устроиться по своей специальности принуждает людей заниматься фрилансом.

Ключевые слова: фриланс, фрилансеры, рынок труда, Казахстан.

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