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Balancing Innovation and Regulation: Comparative Approaches to AI-Driven Labour Market Planning in North Macedonia and China

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Abstract

The aim of this paper is to understand the differing approaches to planned labor between North Macedonia and China, with a focus on the role of artificial intelligence (AI) in their labor markets. As AI advanced, so did the concern about job displacement, particularly in those sectors in which automation and machine learning could possibly replace human workers. This study aims to analyze these risks that concern AI-driven job loss and the implications that could arise for the national economies. The central question that we are addressing is whether countries like North Macedonia and China should or could adopt better and stricter governmental policies on education and labor force planning to lower these risks, or whether a more liberal one, allowing flexible labor market dynamics, would be more beneficial in the long term.

On one hand, China has a structured approach to labor and education-strict quotas, state-directed economic plans, and a big focus on preparing the workforce and society for emerging technological fields like AI. On the other hand, North Macedonia still struggles to create quotas and regulatory frameworks to address these challenges, which leaves the labor market more flexible but also potentially vulnerable to disruptive technological changes.

With the analysis of the both countries' policies, this paper examines how North Macedonia and similar countries can learn from China's model, and create a balanced approach for labor market planning that has account for AI's impact. We also explore the role of education in preparing future generations for the future demands of an AI-driven economy and propose recommendations for policy reforms.

Keywords: Artificial Intelligence, Labor policies, economic planning

Introduction

The development of AI is and will transform the whole world economy; it is providing a higher scale of productivity and innovation, while at the same time raising concerns about possible job displacements. Automation and AI are reshaping the whole industry, creating both opportunities and challenges for the governments, the business sector, and the workers. As the level of AI usage continues to rise, the need for labor market strategies becomes urgent.

The aim of this paper is to analyze both approaches of two nations such as North Macedonia and China toward managing and planning the AI's influence on their markets and workforce planning. North Macedonia, as a flexible and decentralized labor market, still hasn't established a national policy that focuses on these challenges. Meanwhile, China has already created a state-driven approach, including strict quotas, state-directed economic plans, and development, while at the same time focusing on providing its workforce with skills suitable to the new emerging technological fields.

The main focus in this paper will be whether countries like North Macedonia should have elements of China's model, including stricter regulations, educational reforms, including automation, and new workforce initiatives, or have a more liberal, market-driven approach that could possibly better serve their long-term plans. This analysis delves into the potential risks and rewards of these different strategies; it offers actionable insights for policymakers. While analyzing the level of innovation, workforce readiness, and economic stability, the paper focuses on creating a plan and suggestions for the nations to thrive in a new, increasingly AI-driven global economy.

Methodology

The research draws on a comprehensive collection of primary and secondary data sources relevant to AI integration and labor market planning in China and North Macedonia. Primary sources include official government policy documents such as China's *Made in China 2025*, *Internet Plus*, and *New Generation Artificial Intelligence Development Plan (2015–2017)*, as well as North Macedonia's *National ICT Strategy 2023–2027* and publicly available information about its National AI Strategy (FITR, 2021). Secondary sources consist of academic publications, institutional reports from bodies like the World Economic Forum, ITU, World Bank, and the Institute for Security & Development Policy, and credible online databases providing up-to-date labor market and digital skills statistics.

Data selection was guided by the relevance of materials to the core themes of AI development, workforce education, labor market adaptation, and digital skills advancement within the time frame of 2015 to 2025. Efforts were made to include both qualitative policy texts and quantitative labor market data to provide a holistic understanding of the subject matter.

Analysis Criteria

The collected data was analyzed using specific criteria to ensure a structured and focused comparison:

- 1. Policy Scope and Objectives:** The clarity, ambition, and comprehensiveness of national strategies regarding AI adoption and labor market transformation were examined to understand each country's long-term vision.
- 2. Implementation Mechanisms:** Attention was given to the concrete tools and measures governments use to enact these policies, including legal regulations, education system reforms (particularly in STEM and AI-related fields), workforce quotas, and real-time labor market monitoring systems.
- 3. Governance and Adaptability:** The study compared China's centralized, state-driven approach with North Macedonia's more flexible but less coordinated labor market planning, evaluating how governance models influence AI integration and workforce readiness.

Literature review

Political and Institutional Influence on Labor Market Planning in China

China's way of developing the labor market is deeply connected to its political and economic system, which focuses on state-led development, directed by the Chinese Communist Party (CCP). Unlike market-driven economies, where the labor market and its trends largely follow business demands, China's governance enables planned control over workforce development, ensuring that national priorities and plans shape employment policies.

National priorities have huge importance in shaping the employment policies within China's labor market. The biggest characteristic of this system is the mixture of state capitalism with extensive regulatory control. Most important to this frame-

work is the Ministry of Human Resources and Social Security (MOHRSS), which is an administrative body led by the State Council. This institution is formulating and enforcing labor policies, at the same time, is overseeing the employment regulations, and is managing the country's social security system. Also, it has a big role in labor force administration, creating employer-employee relations, and building legal frameworks that lead the workforce operations. With these mechanisms, China keeps and maintains a structured and policy-driven approach to its labor market management (Ministry of Human Resources and Social Security, 2025). They create quotas and education policies to align with the long-term economic goals. The country's Five-Year Plans serve as the biggest roadmaps, highlighting our employment priorities that influence vocational training, labor mobility, and job creation.

The World Economic Forum's annual meeting (www.weforum.org), regarding Transforming Industries with AI and Lessons from China's Journey, says that over the last decade, China has hugely expanded its focus on artificial intelligence and IT industries. Currently, the AI industry is valued at more than \$70 billion and has a balanced ecosystem of more than 4,300 companies, and China sets insights into how nations can connect strategy, innovation, and ecosystem development to boost the AI's transformative potential.

There are several big initiatives that reflect this shift, starting from *Made in China 2025* (2015), which was focused on reducing reliance on foreign technology, and this policy prioritizes advanced manufacturing, robotics, and AI. In 2015, Prime Minister Li Keqiang launched "Made in China" (MIC 2025), an initiative that aims to modernize China's industrial capability. This 10-year, comprehensive strategy focuses heavily on intelligent manufacturing in 10 strategic sectors (see Figure 1) and has the aim of securing China's position as a global powerhouse in high-tech industries such as robotics, aviation, and new energy vehicles such as electric and bio-gas (Institute for Security & Development Policy, ISDP, 2025).

As Wang Zhu et al. (2016) report, *Internet Plus* (2015) is designed to integrate AI and big data into conventional industries, increasing demand for STEM (science, technology, engineering, and mathematics) expertise. The plan aims to integrate mobile Internet, cloud computing, big data, and the Internet of Things (IoT) with traditional industries to promote economic restructuring, improve people's livelihoods, and even transform government functions.

The seminal document entitled "The New Generation Artificial Intelligence Development Plan", released by China's State Council, (2017), reports about the *New*

Generation Artificial Intelligence Development Plan, which outlined strategies to establish China as a global leader in AI by 2030, including measures to reshape education and workforce development, also to seize the major strategic opportunity for the development of AI, to build China's first-mover advantage in the development of AI, to accelerate the construction of an innovative nation and global power in science and technology, by the requirements of the CCP Central Committee and the State Council, this plan has been formulated.

As reported by China Law Translate by the State Council (2023), some initiatives, such as the Interim Measures for the Management of Generative AI Services (2023) and the AI Safety Governance Framework, address emerging risks while fostering technological advancement. To support these policies, the government enforces a series of legal and structural interventions like Education Policies which makes universities required to expand STEM programs, with particular emphasis on AI-related disciplines, beside that also the Labor Quotas with which the state ensures a continuous supply of skilled workers by regulating employment targets in key sectors, also the Employment Monitoring with which AI-driven systems track labor trends in real-time, allowing authorities to adjust workforce policies as needed.

These strategies highlight how China's political and legal institutions actively shape labor markets, favoring economic control and long-term planning over the flexibility seen in free-market economies.

The Economic and Policy Implications of AI-Driven Labor Market Planning

China's big investments and focus on artificial intelligence, IT and high-tech industries has had a huge impact on its economic development, it demonstrated the state's capacity to shape labor markets and economic policy with centralized governance. The shift from a manufacturing-based economy to a technology-driven model is not just an economic evolution but a reflection of China's strategic planning, in which labor policies and AI development are tightly interwoven with political and institutional priorities.

State-Directed AI Integration and Economic Growth

In the early 2000s, China's economic boom was predominantly fueled by labor-intensive manufacturing and export-oriented growth. However, under directives such as *Made in China 2025* and the *New Generation Artificial Intelligence Development Plan*, the government has aggressively transitioned toward AI and automa-

tion, aligning workforce development with national economic priorities. This shift has been reinforced by labor market policies that emphasize STEM education, government-mandated employment targets, and AI-driven workforce monitoring.

As a result, the Artificial Intelligence (AI) software market size will be valued at US\$98 billion in 2024. Growing at a Compound Annual Growth Rate (CAGR) of 30%, the AI software market size will reach US\$391.43 billion in 2030. Generative AI will be the fastest-growing AI framework with a 49.7% CAGR over the market forecast period, with foundation models, optimization software, and model deployment tools offering the largest opportunities. www.abiresearch.com

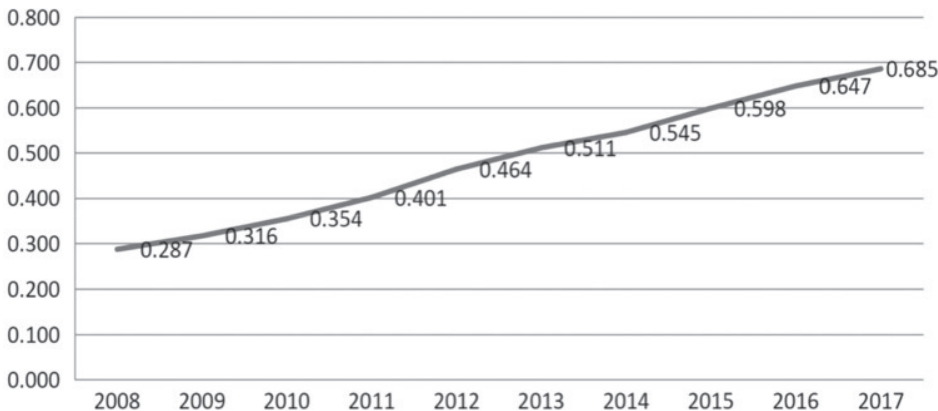
Traditional AI (AI sensing, predictive AI, Natural Language Processing (NLP)) will continue to lead total revenue in the AI software market. This significant growth will be driven by maturing enterprise AI strategies that will make these frameworks more accessible.

Regional Disparities and Policy Challenges

According to Lin et al. (2024), despite national-level economic gains, China's AI-driven growth has been uneven across regions. The artificial intelligence industry development index—a measure of AI sector maturity—reveals stark regional disparities. Beijing (1.033), Shanghai (0.946), Jiangsu (0.876), Guangdong (0.867), and Zhejiang (0.830) lead the country, benefiting from concentrated government investment, research institutions, and advanced infrastructure. In contrast, provinces such as Shanxi (0.189), Gansu (0.160), Xinjiang (0.159), Hainan (0.061), and Qinghai (0.052) lag significantly behind, reflecting broader economic inequalities and limited access to AI-driven opportunities, as shown in the following figure (Fig. 1).

Fig. 1.

National average artificial intelligence industry development level from 2008 to 2017



Source: Lin et al. (2024). *The influence of artificial intelligence on the economic growth of different regions in China*. Scientific Reports, 14, Article number: 9169.

These disparities present critical policy and legal considerations. The Chinese government faces a complex challenge on how to balance national AI dominance with equitable labor market development. To address this, policies may need to focus on redistributive mechanisms, such as regional investment incentives, targeted education reforms, and AI-assisted workforce planning that extends beyond major urban centers.

Labor Market Planning in North Macedonia: The Current State of the Macedonian Labor Market

Unlike China, Macedonia has not implemented a coordinated strategy for workforce development in the face of AI. The Macedonian market is characterized by a greater degree of flexibility, with fewer regulatory controls or quotas dictating the education and employment sectors. As Radonjanin et al. (2024) state, this flexible approach has some advantages, including adaptability to market changes, but it also presents challenges, especially in the context of AI disruption. The World Economic Forum’s Future of Jobs Report 2023, released, assesses the impact of macro trends, as well as technological change, on jobs and skills over the next five years. Their report finds that nearly a quarter of all jobs (23%) globally will change in the next five years. Across 45 economies, covering 673 million workers, 69 million new jobs are expected to be created and 83 million to be eliminated, a net decrease of 14

million jobs, or 2% of current employment (<https://www.weforum.org/>), this is a reason, signal that alarms the countries to take action regarding the matter. North Macedonia hasn't yet developed and created a national strategy to guide workforce development in the new emerging sectors such as AI, robotics, and automation. This lack of planning and not taking any action may leave the country vulnerable, especially the sectors that are getting heavily impacted by AI.

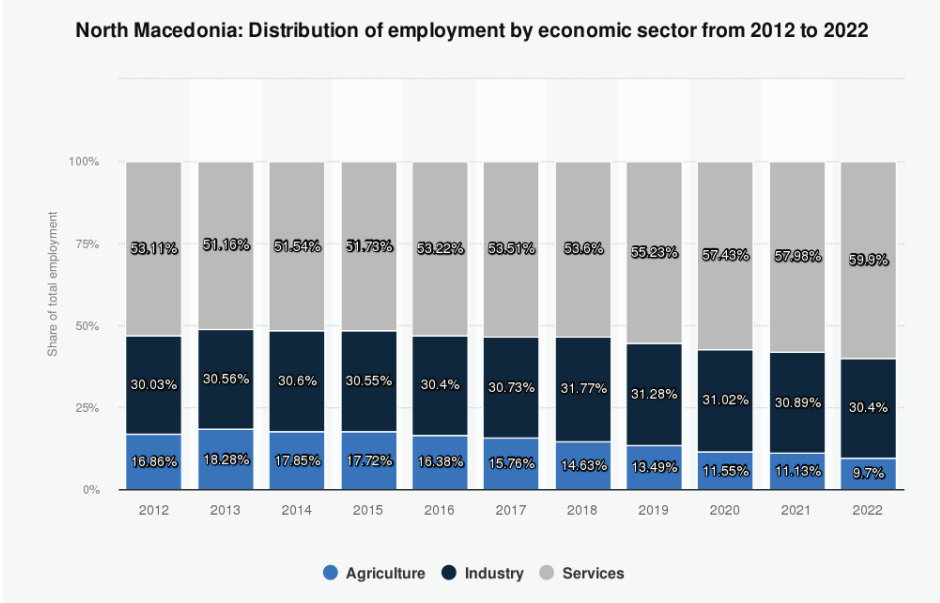
Many of the Macedonian workforce is employed in industries that are highly susceptible to automation, such as manufacturing and agriculture. While the country still focuses on and is making efforts to attract foreign investment and develop the service sector, there is a significant skills gap in emerging technologies. While there are efforts to reform education, the Macedonian system has struggled to keep pace with the demands of a modern, technology-driven economy. The lack of STEM education and training in AI and other emerging fields means that many graduates are not adequately prepared for the types of jobs that will be in demand in the future (www.schoenherr.eu).

The report by the World Bank Group states that North Macedonia's labor market has historically struggled with poor labor planning (www.worldbank.org), particularly when it comes to adapting to global technological changes such as AI. Unlike China, which has actively pursued centralized, long-term strategies for AI integration, North Macedonia has been reactive rather than proactive in shaping its workforce to meet future demands. The skills required for emerging industries like AI, robotics, and data science are not being sufficiently incorporated into the education system. As a result, many Macedonian graduates find themselves underprepared for the rapidly changing labor market. For example, despite the growing demand for tech professionals, STEM education in North Macedonia remains underfunded and insufficiently developed to meet the needs of the digital economy. often, there is analogue automation and an extremely low level of use of artificial intelligence (Bisev et al. 2020).

Many graduates end up in low-skill or traditional industries that are vulnerable to automation. North Macedonia's economy has long been reliant on sectors like manufacturing, agriculture, and textiles, industries that are now increasingly being replaced by automation and AI-driven solutions. The slow shift toward high-tech industries has left the country vulnerable to job displacement without clear plans for retraining and reskilling workers (Gate, 2025)

Fig. 2.

Distribution of employment by economic sector from 2012 to 2022 in North Macedonia



Note: World Bank (North Macedonia data), via Statista 2024

Career Planning and Educational Quotas in North Macedonia

North Macedonia has struggled to develop comprehensive, strategic workforce policies that align with technological advancements, such as the rise of AI and automation. One of the most significant challenges North Macedonia faces in terms of labor planning is the lack of effective labor market forecasting. The country does not have a unified system to predict the future needs of various sectors and how they might evolve due to technological disruption. This lack of data and forward-looking strategies has led to significant mismatches between educational outputs and the real needs of the labor market.

The overall assessment across all areas of digital skills, according to the ITU report, shows that the majority of respondents possess a basic level of digital skills (55.4%), followed by 38.6% who demonstrate above-basic digital competencies. Only 6.0% of respondents exhibit a lower level of digital skills, specifically low (4.5%) or no digital skills at all (1.5%) in the digital domain (Nakjeva Ruzhin et al.,

2021). When this data is compared to the European standards outlined in The Path to the Digital Decade Policy Programme, which sets the target of at least 80% of adults having basic digital skills by 2030, it becomes evident that although many individuals are aware of and meet the basic standard, there is still progress to be made to fully align with EU benchmarks.

From the analysis by Statistics in North Macedonia (www.meta.mk), one of the most significant obstacles to effective labor market planning, besides the digital knowledge in North Macedonia, is its old administrative structure, which has struggled to keep pace with modern demands. The system remains fragmented, with poor coordination between educational institutions, government agencies, and the private sector. Government agencies responsible for education, labor, and employment are often disconnected, making it difficult to implement cohesive policies that align educational outputs with labor market needs. Unlike China, where the government can quickly implement large-scale reforms, North Macedonia's political and administrative system is slow to adapt, making it difficult to respond to the changing dynamics of the labor market.

National ICT Strategy of the Republic of North Macedonia

National ICT Strategy of the Republic of North Macedonia for 2023-2027 (www.ener.gov.mk), was created 2 years after the plan and the speech of the Director of FITR it outlined the country's vision for embracing new advanced technologies, including Artificial Intelligence (AI), Big Data, the Internet of Things (IoT), and Cloud services. These technologies are central to innovation in various sectors such as healthcare and agriculture, with a particular emphasis on AI, Big Data, Cloud computing, IoT, and 5G networks, all of which are expected to play a significant role by 2027.

The strategy highlights the potential for applying these technologies in North Macedonia, supported by a skilled workforce capable of serving highly digitalized industries. It stresses the importance of encouraging local organizations to explore and innovate with these technologies in collaboration with foreign companies, fostering joint digital solutions. To facilitate this, the creation of innovation hubs for advanced ICT technologies is recommended, promoting cooperation between domestic businesses, the academic community, and international companies. This is expected to attract foreign investment into the Macedonian digital ecosystem (www.ener.gov.mk).

As stated in the report, the government's focus on increasing and bettering the number of graduates with STEM (Science, Technology, Engineering, Mathematics) knowledge is seen as crucial to the country's digital growth (ICT, National Strategy, 2023-27).

This emphasis on developing digital skills is key for positioning North Macedonia as a competitive location for ICT companies looking to establish development centers.

Although there is no specific plan for immediate implementation, the strategy focuses on future actions, such as building trust in these technologies, promoting their use for social benefits, and addressing challenges related to data collection and management. It envisions a gradual process of integration, aiming for continuous commitment to these innovations in the coming years.

As a result of these trends in digitalization, and on the initiative of the Fund for Innovation and Technological Development, a working group was established in September 2021 with the aim of creating the country's first National Strategy for Artificial Intelligence. The group includes both local experts and successful Macedonian professionals who are globally recognized and work at prestigious international companies and universities. The National AI Strategy is expected to provide opportunities for many domestic, innovative startup companies to realize their ideas and projects, ensure appropriate education, and facilitate access to modern equipment. However, apart from this general information, no further details or publicly available documents regarding the strategy can be found online, making it difficult to assess its current status or implementation progress (<https://fitr.mk/>).

North Macedonia has certainly established strategic goals for integrating new technologies; the focus remains on preparing the infrastructure, education, and policy framework for the future adoption and widespread use of AI, Big Data, IoT, and related technologies.

AI's Role in North Macedonia's Labor Market

North Macedonia has a dual challenge in integrating Artificial Intelligence (AI) into its labor market, boosting AI's potential and its usage for creating better economic growth, while focusing on the risks of job displacement, particularly in industries that are more traditional. The impact of the AI on the Macedonian workforce is likely to be not even, having some sectors more susceptible to automation than others.

As example, similar to trends in countries like China, North Macedonia's manufacturing sector is at high risk of job losses because of automation and the adoption of AI technologies. As AI-driven systems take over the routine tasks, many manufacturing jobs may be displaced. Without strong government policies and labor market planning, workers in these sectors could be left without a clear path and vision for transitioning to emerging industries.

In this regard, Bisev et al. (2020) assume that, similarly, North Macedonia's service sector faces pressure from AI-driven automation. Industries such as call centers, retail, and administrative services are increasingly relying on AI-powered systems for customer support, inventory management, and data processing.

This shift could lead to significant job losses, particularly among lower-skilled workers. To mitigate the impact, proactive efforts are required to reskill and upskill the workforce, ensuring that workers are prepared for the new roles and opportunities that AI technology can create.

For North Macedonia to successfully navigate these challenges, it will be crucial to invest in retraining programs, vocational education, and policies that facilitate the transition to new, tech-driven industries. Without such initiatives, the country risks facing higher unemployment rates and widening inequality, especially for workers in industries most affected by automation.

Comparative Analysis on the Role of Government in Workforce Planning: Should North Macedonia Follow China's Example?

One key question that arises from this comparison is whether North Macedonia should adopt a more centralized, state-driven approach to labor market planning, similar to China's model. By setting quotas and directing educational resources toward high-demand fields like AI, the government can ensure that the workforce is prepared for future technological shifts, thereby minimizing economic disruption. Through structured training programs and targeted investments in technology sectors, North Macedonia could reduce the risks posed by AI-driven job loss. This proactive approach could also help boost the country's competitiveness in global markets.

On the other hand, some might argue that North Macedonia should maintain its current approach and allow the labor market to adjust more organically. A more liberal approach could encourage:

- **Innovation and Entrepreneurship:** A flexible labor market allows for greater entrepreneurial freedom and innovation. Startups and smaller companies may be better able to adapt to AI developments without being constrained by state-imposed quotas or regulations.
- **Market-Driven Education:** Without strict government control, educational institutions and private companies can be more agile in adapting to the fast-evolving job market, offering new courses and certifications in response to emerging demands in AI and technology fields.

Recommendations for North Macedonia

This paper suggests several recommendations for North Macedonia to address the challenges from AI and automation while fostering economic growth:

- North Macedonia should prioritize STEM education and provide targeted reskilling programs for workers in industries vulnerable to automation. The creation of public-private relations can bridge the gap between academia and industry, ensuring that the labor force is prepared for the future.
- North Macedonia could establish innovation hubs or tech parks, similar to China's model, where AI-driven businesses can thrive and workers can access specialized training in emerging technologies.
- Rather than adopting a strict quota system, North Macedonia could introduce gradual labor market regulations that incentivize companies to invest in AI and automation while also ensuring that workers are protected and retrained for new roles.

Conclusion

As AI is continuing to reshape the global economy, North Macedonia and China are two different examples of how nations can deal with the challenges and opportunities of automation. China's centralized, state-driven model shows the potential of the top-down strategies that are guiding the workforce transitions and are promoting new technological advancements. However, North Macedonia, with its unique and special socio-economic landscape, still has the opportunity to create a way that can mix and have both state support and market-driven flexibility.

This study reveals that China's centralized, strategic approach to AI and labor market planning enables effective workforce development and technological leadership, while North Macedonia's flexible but fragmented system struggles to keep pace with AI-driven change. To address these challenges, North Macedonia should prioritize enhancing STEM education, create stronger public-private partnerships, and implement coordinated labor market policies. Additionally, gradual regulatory frameworks supporting AI adoption, combined with worker reskilling programs, are essential to mitigate automation risks. By adopting these measures, North Macedonia can better prepare its workforce, stimulate innovation, and strengthen its economic resilience in the face of AI-driven transformation.

By focusing on STEM education, boosting public-private partnerships, and investing in innovation hubs, North Macedonia can start building long-term success. A gradual regulatory approach that promotes the business sector to adopt AI while protecting workers with reskilling programs can help the country avoid the negative outcomes of automation. Furthermore, promoting entrepreneurship and allowing educational institutions and universities to adapt organically to market trends and needs can guarantee that North Macedonia will remain competitive and innovative in the technological field.

North Macedonia has already made the beginners steps with its National ICT Strategy, it showed its commitment to adopt digital transformation. However, the strategy still requires bigger focus, need for collaboration between public and private sectors, and better implementation to keep with the evolution of AI and automation technologies.

Ultimately, North Macedonia does not need to fully imitate China's model but can take lessons from its successes. A hybrid strategy—combining proactive government involvement with the dynamism and involvement of a liberal market—offers the best path forward. By implementing balanced policies and boosting its digital initiatives, North Macedonia can turn the challenges of AI into opportunities for economic growth, workforce development, and global competitiveness.

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