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Platforms for Offline Work in Sub-Saharan Africa

A Landscape Scan I

July 2023



Platforms for Offline Work in Sub-Saharan Africa: A Landscape Scan I July 2023

Contents

- Standard Brief: What is Jobtech? 3
- Introduction: Platforms for Offline Work..... 6
- Business Models 9
- Subcategories..... 12
 - Taxi / ride-hailing / delivery / logistics..... 13
 - Home / technical services 14
 - Cleaning / domestic work 14
 - Care services 15
 - Job boards / recruitment platforms 15
 - Distributed manufacturing 16
- Sector Analysis 17
 - Business and Sector (Challenges and Opportunities) 17
 - Worker and Impact (Challenges and Opportunities)..... 18
 - Further Reading 20

This landscape scan was produced by EDU and the Jobtech Alliance team at Mercy Corps and BFA Global with support from the Challenge Fund for Youth Employment. Thanks to Jennifer Otieno, Tracy Mwaura, Wadzi Comfort, Bethany Hou and Chris Maclay for their contributions.

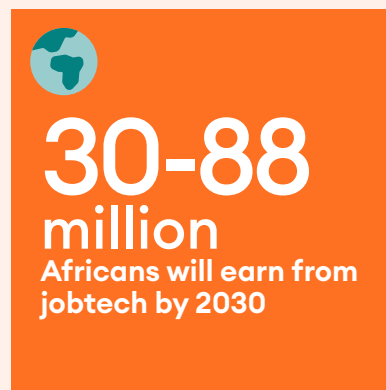
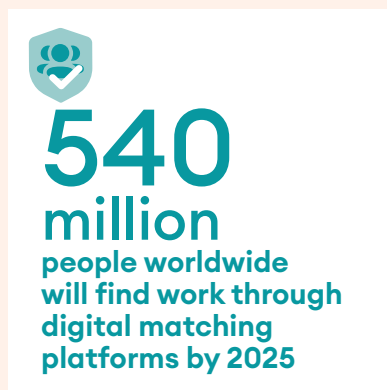
This v1 edition was produced in June 2023 and is one of a series of five landscape scans on the jobtech sector in Africa. The other Landscape Scans also available are:

- ii. Platforms for Digitally-Delivered Work
- iii. Digital Services for Microenterprises
- iv. Technology-Enabled Skilling
- v. Digital Tools for Worker Enablement

If you have feedback on the content of this Landscape Scan for future iterations, please contact info@jobtechalliance.com

Standard Brief: What is Jobtech?

'Jobtech' refers to digital platforms which connect people to work opportunities that build livelihoods. Simply put, jobtech is the future of work. [540 million](#) people worldwide will find work through digital matching platforms by 2025, with significant growth expected in Africa; [30-88 million](#) Africans will earn from jobtech by 2030. Jobtech involves the use of technology to enable, facilitate, or improve people's productivity to access and deliver quality work. Today, we count over 500 jobtech platforms in Africa.



See the below table for the [Jobtech Taxonomy](#) defining the five major categories and definitions within the space.



Platforms for offline work

Category definition

Platforms where work is mediated online but delivered offline, also known as “location-based platforms” as per the World Bank.

Subcategories

1. Taxi / ride hailing / delivery / logistics
2. Home services / technical services
3. Cleaning / domestic work
4. Care services
5. Job boards / recruitment platforms
6. Distributed manufacturing



Platforms for digitally delivered work

Category definition

Platforms where work is mediated and delivered online, sometimes known as “cloud work.”
The category does not include online jobs when the work is not delivered through the platform (i.e., job boards).

Subcategories

1. Skilled online freelancing
2. Managed services / global business services / BPO (including managed microtasks)
3. Task-based or distributed microwork / microtasks
4. X-to-earn / play-to-earn
5. Platforms for creative content producers / influencers
6. Trading platforms for digital products



Digital services for micro-enterprises

Category definition

Platforms that improve access to market, business performance, or productivity of self-employed individuals or microenterprises. The category does not include pure fintech players or players targeted only at larger scale SMEs.

Subcategories

1. E-commerce marketplaces
2. Business management tools / vertically-integrated platforms
3. Social commerce / digitally-enabled agent models



Tech-enabled skilling

Category definition

Edtech platforms that equip people for the world of work.
The category does not include platforms with no tech product.

Subcategories

1. Course / guided / cohort-based learning
2. On-demand / self-paced learning
3. Digital apprenticeships / mentorship / internships
4. Professional networking / labour market information platforms
5. Assessment / credentialing



Digital tools for worker enablement

Category definition

Digital platforms that provide workers with tools that enhance their rights, benefits, and protections.

The category does not include tools with no tech product or tech integration.

Subcategories

1. Identity / reputation
2. Alternative data tools / benefits
3. Rights / legal / collective engagement

Jobtech has huge potential to alleviate the youth unemployment challenge in Africa. We have seen that jobtech has the potential to create new work opportunities that were not previously possible, improve regularity and quality of work, size of income, and overcome traditional barriers to access for marginalised groups. But we've also seen that it can create bad work as well as good, and create new barriers to access for marginalised groups. The market fundamentals are challenging, and there is a lack of innovation in the space. Few startups have succeeded and few funders know how to effectively contribute. There is little shared knowledge about what does/doesn't work, and a lack of visibility and community limits scope for collaboration.



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Our goal of these landscape scans is to provide an introduction to jobtech for entrepreneurs, investors, researchers, and policymakers alike. It will shed light on the vast potential that jobtech has to enable the jobs of the future, but will also critically reflect on some of the challenges and dilemmas that are inherent to the growth of jobtech across Africa. Ultimately, our goal is to inspire thinking on how this nascent, yet overlooked part of how Africa's digital economy interfaces with the physical. We hope these scans will provide a helpful starting point to inspire you and challenge your thinking.



Introduction: Platforms for Offline Work

Platforms for offline work can play a key role both in making existing labour markets in Africa more efficient and effective, as well as creating new markets for labour. Platforms for offline work connect supply and demand for labour through the use of technology. The ILO and others refer to this category broadly as “location-based platform work.” These platforms are digital intermediaries between service providers and customers. They do this by offering their customers access to each other and enabling them to realize gains from trade, or other interactions, by reducing the transaction costs of finding each other and of interacting.

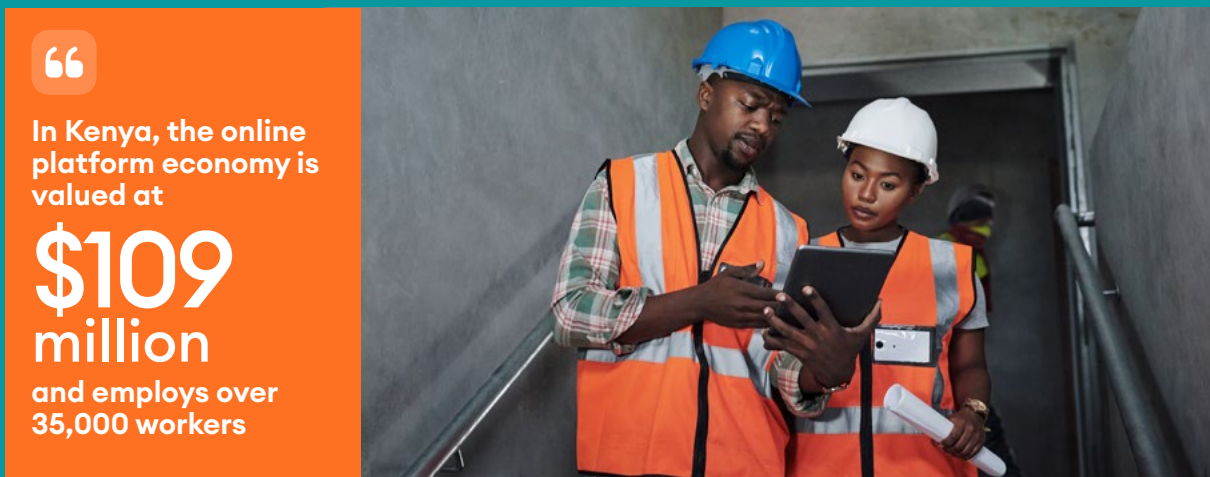
These platforms function as a digital means of discovery or distribution networks for physical services like transportation, delivery, and errands that are performed as a result of online orders. Ride-hailing platforms in particular account for the lion’s share of market value of the online-to-offline gig market ([globally, the 7 biggest players account for ~\\$15B+ in revenue as of 2019](#)). However, several companies are redefining access to other offline delivered services for their local markets, bringing access to formal and informal labour online. Examples in addition to ride-hailing include domestic cleaning, logistics and on-demand delivery, healthcare, and home and care services.

The first wave of jobtech platforms in Africa was driven by online job boards - listing platforms of vacancies in the formal sector. These platforms did, and continue to play, an important role in improving efficiency and access to opportunity in African labour markets. But, beyond increasing transparency, such platforms did not address some of the more significant challenges of a broken labour market, such as a lack of skilling, unfair pricing, and limited demand for labour. Therefore, platforms for offline work have significantly evolved since, with many platforms today solving deeper problems in the labour market: providing skilling and training opportunities to job seekers, structuring services to make them more appealing to service buyers, or creating value-added products and services that can improve the quality of work for the provider and/or quality of service for the buyer.



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In Kenya, the online platform economy is valued at

\$109 million

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The second wave of platforms for offline work in Africa has focused on digitising informal labour markets (which account for about 80% of employment in Africa), from taxi drivers to beauticians. In recent years, the platform work sector has expanded considerably on the continent, especially in urban and peri-urban areas. [2021 research conducted by the Jobtech Alliance](#) found around 220 platforms for offline work across the continent, most of which are homegrown and are creating income-generating opportunities for millions of Africans. In Kenya, the [online platform economy](#) is valued at \$109 million and employs over 35,000 workers. This is anticipated to grow at a rate of 33 percent annually, employing over 90,000 workers by the end of 2023. Fairwork estimates there to be another 30,000 workers in location-based platform work in [South Africa](#), and between 60,000 and 100,000 platform workers in [Ghana](#).

Jobtech platforms are typically seen as asset-light models where value is generated from mediating transactions, positioning it as an attractive business proposition. The cost of capital equipment and of its maintenance is borne by one side of the market. For example, Uber drivers not only provide their labour; they also need to finance the purchase of the car and then take care of its maintenance. Similarly, delivery couriers and workers using online platforms to secure gigs use their own equipment. In this way, platforms transform the fixed costs of a business into variable costs. Income can therefore be generated without deploying large amounts of fixed capital. Once they establish a critical mass of users, jobtech platforms can rely on organic growth through the network effects established as a result of additional users being attracted by the existing user base.

One issue is that many platforms in Africa have struggled to maintain this asset light model, given a lack of capital and/or a lack of assets on the user side. For example, the traditional double-sided Uber marketplace of driver and passenger in Africa has largely become a three-sided marketplace consisting of driver, passenger, and vehicle owner. Different platforms have taken different approaches to solving this, in some cases taking asset ownership in-house, with others offering financial services to enable participation on the platform.

These online-to-offline platforms present a unique opportunity within the informal sector for workers to independently offer services and earn from their existing skills and to better bridge the gap between job seekers and employers or service providers and consumers. Online marketplaces can also reach beyond traditional social or geographical circles, reducing barriers to access and/or traditional prejudices for more marginalised groups.

But as [Fairwork](#) scores consistently point out, gig work on ‘algorithmic platforms’ often brings a range of quality of work questions. More on this below.



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Rather than just solving for information asymmetry and convenience as many Western platforms for offline work have done, African platforms for offline work are often solving for a far wider set of labour market failures.

Moreover, operationally managing such platforms in Africa has proven challenging for many entrepreneurs. Marketplace platforms require a critical mass of users - drivers, passengers, or both - for a market to gain liquidity and become self-sustaining. How to build up, and then balance, supply and demand is a primary consideration when starting a platform for offline work. But many African marketplaces have struggled in different ways with each side of these marketplaces. On the demand-side, many platforms have been constrained by [low local purchasing capacity](#), high costs of user acquisition, and low customer loyalty. On the supply-side, many platforms have had to take on greater operational responsibility to facilitate successful job matches, including in vetting, training, supply chain and more. Rather than just solving for information asymmetry and convenience as many Western platforms for offline work have done, African platforms for offline work are often solving for a far wider set of labour market failures. While this makes such platforms all the more valuable, it has been challenging for many platforms in this space to achieve scale, business viability, and/or profitability.

Through a literature review and key informant interviews with entrepreneurs, accelerators, funders, and youth engaged with jobtech platforms for offline work across Africa, this landscape scan seeks to better understand the landscape of jobtech platforms for offline work across Africa. The sections below outline the business models utilised in jobtech platforms for offline work, the subcategories as outlined in the [Jobtech Taxonomy](#), and insights about both business opportunities and jobs impact outcomes from work in this sector.

Business Models

Some platforms for offline work take a commission on transactions while others charge for leads, charge subscription fees, or earn revenue through advertising or value-added services. Since the platform economy is still relatively new in Africa, diverse business models are still being experimented with.

While the first generation of jobtech platforms in Africa tended to use ‘lead generation’ business models (the platform simply generates leads or improves the transparency of market interactions, such as listing platforms), these have tended to be subsumed by ‘full service’ platforms which are involved in the whole transaction until completion of service. This is largely because lead generation platforms generally weren’t able to overcome core challenges within the labour market (e.g. gaps in skills, communications, and/or pricing). This has happened both with white collar matching where job boards have increasingly offered a spread of full-service recruitment offerings (shortlisting, vetting, preliminary interviews), as well as blue collar matching platforms which offer set price gigs as opposed to offering a range of providers.

While not exhaustive, the table below highlights some of the common business models used by platforms for offline work in Africa:



Some platforms for offline work take a commission on transactions while others charge for leads, charge subscription fees, or earn revenue through advertising or value-added services.



Listing fee model

Who pays: Either the employer (more common in job boards) or the service provider (more common in gig marketplaces) pays to list or promote the service or vacancy via the platform. This model facilitates discovery through aggregation.

Limitations: Model relies on willingness to pay, which can be limited both from employers, and for service providers who have low incomes and/or trust in such platforms’ ability to generate jobs (particularly in weaker economies). Platforms may focus on quantity over quality of vacancies or service providers in order to maximise revenue, which could negatively impact the overall user experience and harm the platform’s reputation in the long run. Most lead generation platforms in Africa have to supplement with other revenue streams.



One-, two-, or multi-sided commission fee model

Who pays: Commission is taken from transactions with suppliers, consumers, and/or third parties paying. The platform sets rules regarding openness, governance, logistics and pricing, and puts suppliers and consumers in direct touch with one another.

Ride-hailing platforms often charge both drivers and riders. Some home services platforms charge customers while others charge the service provider. Multi-sided platforms like food delivery involve several entities in the ecosystem that are participating in transactions, and could charge restaurants and consumers.

Limitations: Many platforms have struggled with commission transparency. Full transparency leads to cut out and users tricking the system, but opaqueness leads to low user rights and worker manipulation.

A platform may prioritise the interests of employers over job seekers if they generate more revenue, which is potentially disadvantageous to one side of the platform. This has been seen in ride hailing, when discounts are offered that disadvantage the driver's earnings so more clients can use the platform. Ride hailing and food delivery platforms tend to still be highly subsidised by venture capital, making it difficult for new entrants to compete. When subsidies end and prices increase, the viability of these platforms also comes into question.



Subscription / membership fee model

Who pays: Platforms charge consumers either a flat or a variable fee per month or per year according to a subscription plan based on the frequency of use, specific services or the number of requests. The platform collects the subscription fee from consumers and then releases the money to the service providers without a commission. The demand side is usually charged in this model.

Limitations: Subscription models are unpopular in Africa B2C markets, and can be difficult to scale.



Freemium + secondary revenue streams

Who pays: Platforms offer core services free of charge, but offer additional services at cost. This could involve job boards charging for training or certification, or gig matching platforms charging for financial services or equipment lease. It could involve third parties like advertisers paying to host ads or content.

Limitations: Given generally low scale of platforms, relying on secondary revenue streams can be risky.



Grant-funded

Who pays: Some platforms have developed sustained partnerships with philanthropic actors to screen, train and place candidates, often in emerging sectors or for marginalised jobseekers.

Limitations: There is limited scale potential, and relationship-building on the philanthropic side often requires an entirely different team capacity.



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Subcategories

The Jobtech Taxonomy outlines six subcategories of platforms for offline work:



Taxi / ride-hailing / delivery / logistics

Description: Platforms which match drivers/riders to households or businesses for gigs.



Home / technical services

Description: Platforms which match cleaners to gig- or ongoing work with households or businesses.



Cleaning / domestic work

Description: Platforms which match technicians like beauticians or plumbers to households or businesses for gigs or short-term services.



Care services

Description: Platforms which match care workers like elderly carers, nannies, or medical services to households or businesses for gigs or ongoing work.



Job boards / recruitment platforms

Description: Platforms which host job vacancies (including full-time, part-time or internships / apprenticeship). They may offer hands-on recruitment / vetting or additional services to jobseekers like online / offline training.



Distributed manufacturing

Description: Platforms which distribute large manufacturing orders (such as for beauty items) between a distributed workforce where producers make items from home or personal studios.

Each subcategory is explored in more depth in the following sections, with most relevant insights including definitions, challenges, themes, and company examples.



Taxi / ride-hailing / delivery / logistics

Ride-hailing services are apps that connect passengers and local drivers using their personal vehicles. Before the emergence of ride-hailing technology, the taxi industry was governed by oligopolies in formal markets and was characterised by high informality and fragmentation in emerging markets.

Ride-hailing services like Uber allow users to hire a driver using a smartphone from almost any location at any time. Proprietary software utilises an algorithm to allocate rides to a pool of drivers circling within proximity of the rider, offering the customer a selection of options, from a range of vehicle quality and pricing choices. The price is generally set before the trip starts and paid in advance or at the agreed destination.

The biggest players in this space in Africa tend to be the globally dominant ride-hailing and delivery apps like Uber and Bolt, with an additional presence on the continent from Russian-based InDrive, Spanish-based Glovo, and French-based Heetch, among others. Bolt has as many as [700,000 riders registered](#) in Africa, though it is unclear how many are active.

However, there are other notable African examples in the ride-hailing and delivery sectors. [Sendy](#) is a Kenyan logistics startup that connects clients (e-commerce, enterprise and freight) to drivers and vehicles (motorbikes, vans, lorries) for goods delivery. The startup currently has offices in Kenya, Tanzania and Uganda, with 5,000 vehicles on its platform that move a wide array of goods. [SafeBoda](#) is a Ugandan ride-hailing app offering rides, parcel / food / shopping delivery, payments, savings and other financial services. The company counts [more than 25,000 drivers who have completed over 40 million orders](#) between Uganda and Nigeria (though it exited the Nigerian market in late 2022). There are ride and logistics platforms targeting almost every market such as [Teliman](#) in Mali or [Wasili](#) focused on tertiary Kenyan cities. In West Africa, Nigeria-based [Max](#) connects drivers to key stakeholders including EVs, services, and enterprises, Ghana-based [Smooove](#) aims to simplify the home moving process, and Nigeria-based [Gokada](#) helps complete last-mile delivery.



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This category has proven difficult to turn profitable, and though the sector has expanded hugely, it tends to be fuelled by venture capital. There have also been questions about quality of work on such algorithmic platforms, with ride hailing and delivery platforms often scoring low on Fairwork ratings. In the [Kenyan 2022 Fairwork ratings](#), for example, no ride-hailing app scored higher than 4/10 for fairness of work, with several platforms scoring 0/10. More on this will be discussed within the “Sector Analysis” section.



Home / technical services

Home service platforms provide clients with access to personalized home services ranging from home cleaning services, repair services, to lawn care, among others. They save users and clients the time and money they would have otherwise spent trying to find each other in the offline world. These platforms also provide some level of quality control, as service providers are usually vetted and trained when they sign up to the platforms.

There is large scale in the informal trade sector in Africa, and players like [Kandua](#) in South Africa, subscription-based [Eden Life](#) in Nigeria and Kenya, and [LaborHack](#) in Nigeria are seeking to organise and professionalise the space. As these jobs are often more skilled and certainly more heterogeneous, there is variance in the user experience as well as the cost. Many platforms take on significant operational burden to maintain quality, which can make such platforms difficult to scale (Kenyan home services marketplace [Lynk’s case study](#) may be of interest). While such operational burdens add to price, customer willingness to pay more for quality services is low, [again limiting the capacity of such platforms to scale](#) in Africa, though B2B models in this space may have more viability.



Cleaning / domestic work

These platforms provide customers with domestic work services on demand. Similar to home / technical platforms, these platforms typically vet and train their workers before allowing them to offer their services through the platform, though this work tends to be more commoditized.

South African platform [SweepSouth](#) is by far the biggest on the continent, with more than 10,000 monthly users across four South African cities. SweepSouth has made significant contributions to the employment landscape in South Africa by providing a platform for job seekers to find work opportunities as domestic cleaners. The platform has enabled thousands of women from low-income households to gain access to flexible work opportunities, fair pay, and the ability to work with dignity. [As of 2020,](#)

[SweepSouth](#) had a network of about 1,500 cleaners in South Africa and had expanded to other countries on the continent. However, they later [exited from Nigeria and Kenya after failed expansions](#). Other smaller players exist in multiple markets, such as the [Mama Fua app](#) in Kenya.



Care services

Care service jobtech platforms focus on connecting customers with professional caregivers such as nannies, nurses, and elderly care providers. These engagements tend to be longer-term or repeat engagements, and are often with skilled or trained professionals, sometimes with relevant certifications. Care services platforms typically charge a commission or service fee for each booking or subscription.

While there are not a lot of African examples in this jobtech subcategory, platforms like [WeSit](#) in South Africa and [Mogzit](#) in Ethiopia enable families to hire babysitters and nannies. Healthcare platforms such as Ugandan-based [Rocket Health](#), Nigeria-based [GeroCare](#), and Kenya-based [Tibu](#) connect patients with at-home care services. Internationally, US-based platform [HonorCare](#) connects home care professionals to help older adults with essential daily activities, [Sittercity](#) connects US-based families with qualified and experienced caregivers, including babysitters, nannies, and pet sitters, and UK-based [Koru Kids](#) connects parents to part-time nannies.



Job boards / recruitment platforms

Job boards and recruitment platforms typically feature job listings from employers looking to hire full-time or part-time staff. These job listings can be filtered by job type, location, and other criteria to help job seekers find the right job. From the employer side, these platforms offer a wide range of automated or augmented screening and shortlisting services.

Many job boards operate on a freemium business model, where basic services such as job listing and resume submission are free, but additional features such as resume search and candidate matching require a fee. Other platforms charge a fee to employers to list job vacancies or take a percentage of the employee's salary as a commission.

While traditional job boards exist in every country in the continent - with [Jobberman](#) in Nigeria, [Brighter Monday](#) in Kenya, and affiliates under the [ROAM group](#) across the continent as the biggest players alongside others like [Fuzu](#) - these platforms have tended to seek viability by layering on additional services. Many actors offer hands-on shortlisting or managed recruitment services to employers. They offer paid training, certification, or job search assistance services to jobseekers.



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Some recruitment platforms have found success collaborating with the philanthropic sector, receiving grants to train and place young people or marginalised groups into suitable roles. Kenyan-based [Shortlist](#) has focused its business around two areas: (1) executive search, with hands-on recruitment for senior candidates (2) outreach, matching and upskilling for impact-focused partners.



Distributed manufacturing

Distributed manufacturing techniques are changing how and by whom consumer goods are produced and have several advantages over traditional manufacturing. The concept of distributed manufacturing offers several benefits to companies. First, it eliminates the need for large capital investment in a single factory. Second, it allows for greater flexibility in dealing with fluctuating demand. Third, it enables different producers to specialise in different areas of production, leading to a more diverse and skilled workforce. However, it brings operational drawbacks around quality control and reliability.

Distributed manufacturing has experienced the [slowest traction](#) among the offline work categories. [Soko](#), a Kenyan luxury jewellery retailer selling primarily to international markets, uses a tech-enabled distributed manufacturing model to allow local artisans to use their own tools and materials to produce a range of jewellery products.

Sector Analysis

We see the following trends as key themes for platforms for offline work over the coming years, both for business and job outcomes. We have separated sector analysis into two buckets: business and sector (challenges and opportunities) and worker and impact (challenges and opportunities).



Business and Sector (Challenges and Opportunities)

Competition with the informal sector in Africa: [A 2018 ILO estimate](#) shows that 93% of all employment in Nigeria is informal, and with comparable figures in Kenya over 80%. While platforms in Western markets tended to compete with the formal sector, many platforms for offline work in Africa compete with the informal sector, with (usually) illegally underpaying wages, and non-existent or ambiguous labour norms. This makes it difficult for platforms to be price-competitive in a highly price-sensitive market, and also creates difficulty in maintaining standards.

The role of platforms for offline work as market creators: Probably the biggest question about scale of these platforms in Africa revolves around whether there is enough customer demand for such platforms. While there may be insufficient demand to create huge platforms merely by moving a transaction online (by moving a job from the analogue to the digital world, it doesn't make up for the shortage of jobs on the continent), [there is opportunity for market creation, as the late Clayton Christensen and Efosa Omojo](#) would propose. This comes from moving non-consumption of labour into consumption, and by making services more simple, affordable, or accessible to a new segment of people. There are unquestionably more people taking taxis now than before ride-hailing platforms entered Africa, for example. The challenge will be replicating this growth in other sectors, particularly with price sensitive customers, so as to not just create races to the bottom in terms of pricing for labour. More on this theme in The Flip's podcast episodes on [vertical platforms](#) and [standardization](#).

“Super apps” vs. vertically-integrated platforms: Some of the fastest growing platforms in emerging markets over the past decade have been super apps like Indonesian GoTo, which combines ride hailing with delivery, home services, financial services and more, and [contributes to as much as 2% of Indonesia’s GDP](#). [Many ride hailing platforms in Africa](#) have sought to combine ride hailing with additional services to become “super apps” themselves. This could be one evolving path for these platforms to operate across many verticals.

Alternatively, we see some platforms building [vertically integrated solutions](#), going deep into individual value chains within specific sectors, and finding opportunities for monetization [across the value chain](#). More on this topic in our landscape scan on [digital services for microenterprises](#).

Worker and Impact (Challenges and Opportunities)

Fairness of platforms to platform workers: The [Fairwork](#) Project, which is based out of the Oxford Internet Institute, looks at the fairness of digital labour platforms across emerging markets by scoring against [principles](#) including fair pay, fair conditions, fair contracts, fair management, and fair representation. Scores are consistently low across the continent. In Nigeria in 2022, not a single platform scored a single point out of ten in terms of fairness.

Research from development economist [Julie Zollmann](#) found that ride-hailing platforms in Kenya scored low on their potential to create new jobs and increase wages. This is particularly the case when drivers don’t own the cars themselves. Constrained by local consumption, platforms often reduce fees in an effort to stimulate demand, but doing so doesn’t necessarily increase ride volume. However, Zollmann did find that these platforms tend to improve dignity of work in the taxi sector, and that there is relatively high satisfaction of work among riders (more on the topic in [this](#) Jobtech Alliance webinar).

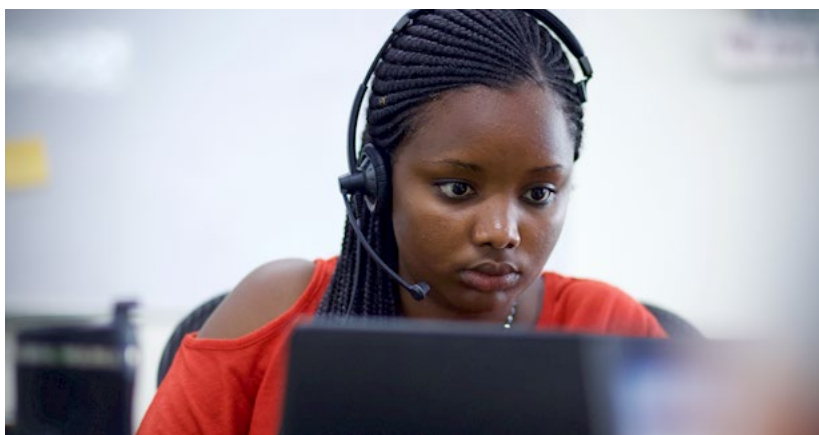
How this fair work challenge is reconciled is a big question across African markets, and regulation may play a big role. The question remains on how to increase both quantity AND quality of work. Stakeholders fear that inappropriate regulation could undermine business viability and limit the potential of these platforms to provide work for Africa’s millions. Related to the above, they also point out that, while these platforms may not offer quality of work that compares well with the formal sector, most of these platforms offer significantly improved conditions compared to the informal sector where these roles previously existed.

The Jobtech Alliance, in partnership with International Labour Organization’s Systems Change Initiative and the Challenge Fund for Youth Employment, have developed a tool to assess quality of work as experienced by users. This tool can be used by platforms themselves, investors, donors, or other interested actors, and is available online [here](#).

Worker growth: Connected to the above, there has been concern that some platforms - particularly algorithmic platforms - offer few opportunities for personal, financial or career growth. While this could be said for many informal sector jobs or lower-skilled roles, this is both negative for workers and for platforms who seek to retain their users. There is opportunity to explore growth paths within platforms, from platform-based upskilling to better-paying jobs over time on platforms, which build user satisfaction as well as career growth paths.

Gender parity of platform workers: Platforms for offline work show great potential as well as great challenges with regards to female participation. Platform-based work offers the potential to overcome traditional prejudices and to respond to work needs of female workers. [A 2019 Overseas Development Institute \(ODI\) report](#) found that 74% of women on digital work platforms in South Africa could balance work and family commitments better due to the ability to choose work hours around their lifestyle. [CGAP](#) found that 70-80% of women on platforms in Nigeria, South Africa, Kenya, India and Indonesia believed that platform work had created new income opportunities for them. In addition, this sector provides an opportunity for increased gender equality as more nimble, innovative organisations come in, disrupting sectors that are traditionally male. However, women remain under-represented in subcategories such as ride-hailing, with [only 5% of Kenyan app drivers being female](#). Players like Bolt have introduced women-only features to address issues of driver safety and sexual assault. Gender-based violence and harassment remain a major challenge facing female drivers and other female platform workers. With greater innovation, regulation and intentionality, platforms could bring more women into the sector.

Opportunities to layer benefits or securities: Some platforms offer their workers benefits such as access to insurance, training, and support, which can help to attract and retain a high-quality workforce. Financial responsibility is sometimes owned by the platform, and sometimes by the user. For example, ride hailing platform [Safeboda partnered with microinsurance platform Turaco](#) to offer affordable life and health insurance for riders, which also provides a secondary revenue stream for the company. More info on benefits is in our landscape scan on Digital Services for Worker Enablement.



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Further Reading

1. [Jobtech Alliance - Reading Library](#): comprehensive library on resources useful for jobtech platforms and others in the ecosystem
2. [CGAP - Gig Platforms and Financial Inclusion Resources](#): featured think tank publications on platform work include deep dives on women in the platform economy
3. [The Flip - Marchetti's Motorcycles Redux: Pricing for price-sensitive markets](#): deep dive on how pricing mechanisms can balance supply and demand for ride-hailing services in Africa so they can achieve liquidity / scale
4. [The Flip - What does ride-hailing in Kenya show us about the prospects for digitally-mediated work in Africa?](#): commemorates 8 year anniversary of ride-hailing apps entering Kenya and how these apps have stacked up against initial expectations in the areas of job creation, potential for dignity, and potential to increase wages
5. [Caribou Digital and Qhala -The experience of platform livelihoods in the Global South: A literature review](#): segmentation of platform worker experience into 12 core experiences (e.g., access to work and markets, earnings, inclusion) and how they interact with gender, rurality, youth, and COVID-19
6. [The Flip - Lynk: Lessons Learned the Hard Way](#): ex-COO of Lynk (services matching platform) explores operational model pivots of Lynk and why they failed and improved on past versions of the company
7. [Jobtech Alliance - Why your jobtech platform needs to be aware of "winner-takes-all" outcomes](#): explores challenging winner-takes-all dynamics and why addressing this problem can help scale jobtech platforms
8. [Afridigest - How Africa's super app landscape is evolving](#): explores factors driving the growing trend of super apps in Africa by archetype within the context of "three waves": e-commerce, the aforementioned super apps, and fintech
9. [The Flip - The Future of Work is Vertical Platforms](#): describes how verticalization / digitization of startups on the continent can address Africa-specific problems by providing the full suite of the infrastructure and tools needed for entrepreneurs to earn a livelihood (further reading here: [The Digitalization of the African Microenterprise](#))
10. [The Flip - Solving Problems in Africa by Taking the Worm's Eye View](#): episode on main problems faced by startup founders on the continent; features interview with Ricky Rapa Thomson, co-founder of SafeBoda (motorcycle taxi ride hailing app)